## Combination Edits Overview

**Combination Editing** is a feature in Cardinal that helps to maintain data integrity across all modules. Combinations of ChartField values can be established to be used in editing journal entry lines in General Ledger and the other Cardinal modules.

The three components of the ChartField editing configuration are the Combination Definitions, Combination Rules, and Combination Groups.

**Combination Definition** defines the ChartFields that are required or optional in the combination edit. For example, a Combination Definition may require an Account and a FIPS code be defined on each journal line.

**Combination Rule** defines the valid values of the ChartFields that are named in the Combination Definition. In other words, the Combination Rule defines the specific values of each ChartField that will or will not pass the editing process for a Combination Definition.

**Combination Group** links the Combination Rules that are to be applied as a group during the edit process. All rules within a group must have the same Combination Definition. ChartField combination editing compares the values entered in Cardinal to the Combination Definitions and Combination Rules that are defined.

Typically, the Combination Edits in Cardinal for all agencies are set up under the **SetID** of **STATE**; however, there could be exceptions. For example, the Combination Edits that are set up for Virginia Department of Transportation (VDOT) are all established under the SetID of **50100**.

In Cardinal, there are two tools that can be used to review the Combination Rules and help identify the cause of a Combination Edit error.

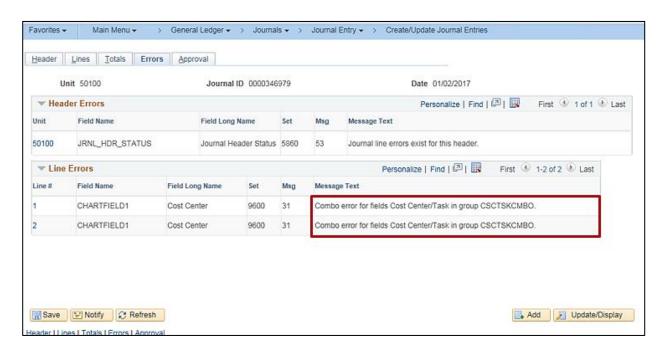These tools are the **Review Combination Data** inquiry page and the **ChartField Combination Editing Rule Report**.

## Table of Contents

## Receiving a Combination Edit Error

When a Combination Edit error occurs, the error message identifies the Combination Group which was violated by a specific ChartField string. The Combination Group can be used to identify the associated Combination Rule.

**Combination Edit Error Example**

For example, lines numbered 1 and 2 of this journal have a Combination Edit error relating to the **Cost Center/Task in group CSCTSKCMBO**. This message gives us the specific Combination Group but not the Combination Rule.
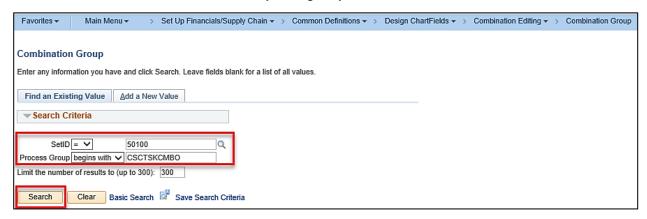
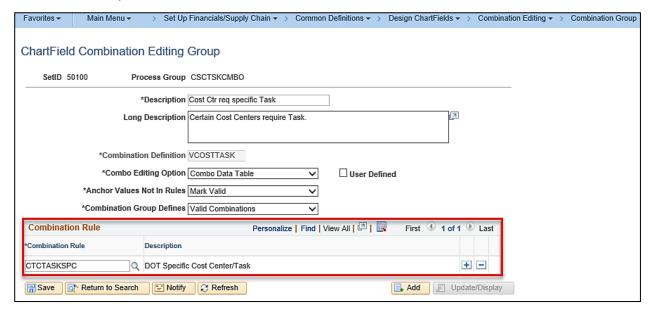## Identifying the Combination Rule

1.  Log into Cardinal and navigate using the following path:
    **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Combination Group**

    **Note**: Your SetID will default based on your agency.



2.  Enter the Combination Group in the **Process Group** field and click the **Search** button.

3.  The **ChartField Combination Editing Group** page displays. All of the associated Combination Rules are listed under the **Combination Rule** record. If there is more than one rule associated, a user may be able to narrow down the choices based upon the text that is found within the error message. In this example, the error relates to the Cost Center and Task (i.e., Combination Rule – **CSCTSKCMBO**).
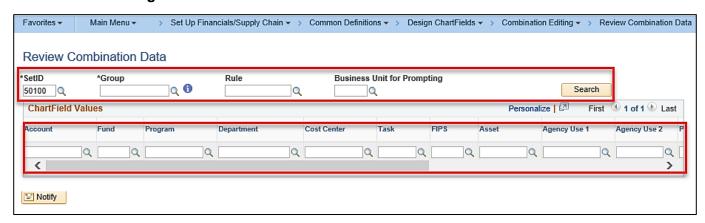
## Reviewing Combination Data Inquiry

This inquiry page retrieves data relating to valid ChartField combinations that have been entered and built in the system during Cardinal's overnight batch processing. If a new combination is created, it will not appear in this inquiry screen until after the build process is run overnight in Cardinal.

1.  Log into Cardinal and navigate using the following path:
    **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Review Combination Data**



    **Note**: The **SetID** will automatically populate based on the Agency of the user.

2.  Enter or select (via lookup) a **Group** name (required).

3.  Enter or select (via lookup) a **Rule** or leave the field blank.

    **Note**: When a **Rule** is not specified and is left blank, every **Rule** under that **Group** is retrieved.

4.  Enter or select (via lookup) the **Business Unit for Prompting** (i.e., the Business Unit associated with the Group).

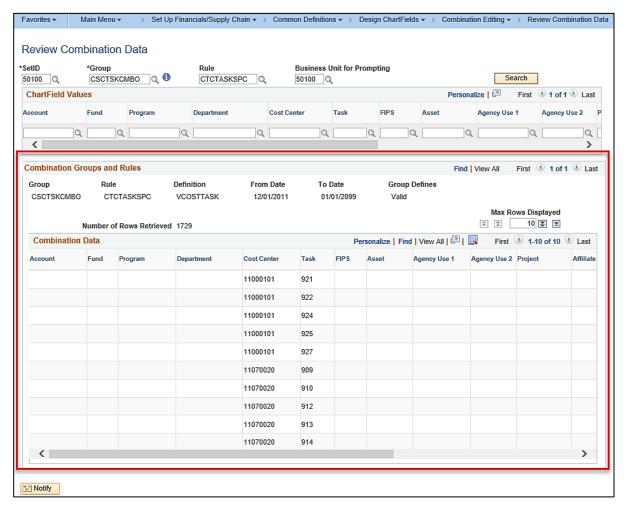5.  Under **ChartField Values**, enter or select (via lookup) any ChartFields that narrows the resulting data.

    **Note**: This area does not need to be filled out if the desired output is to retrieve all combinations associated with a combination group/rule. Use the wildcard (**%**) along with a series of numbers in any field to limit the number of ChartField values that are returned.

6.  Click the **Search** button.

**7.** The results will appear below the ChartField Values under **Combination Groups** and **Rules**.

## Extracting Data from the Review Combination Data Option into Excel
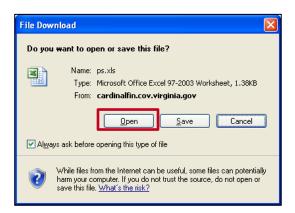


1. Look at the **Number of Rows Retrieved**:

   a. If it is more than the **Max Rows Displayed**, insert the cursor into the **Max Rows Displayed** number area.

      i. Update the number under **Max Rows Displayed** to equal the **Number of Rows Retrieved**.

      ii. Select the **Last Row** icon.

   b. If it is not more than the **Max Rows Displayed**, proceed to step 2.

2. Click the **Download** icon.

   **Note**: Some users will have to hold down the CTRL key while selecting **Download** until a subsequent window opens and the **File Download** message appears because, on some computers, Internet Explorer will try to block the site.
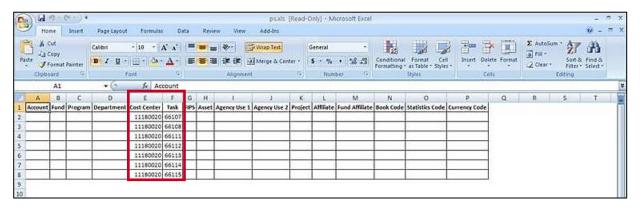
**3.**   Click the **Open** button and the following message will prompt in Excel.



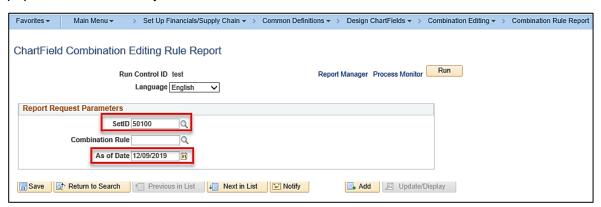**4.**   Click the **Yes** button and the data creates an Excel worksheet.

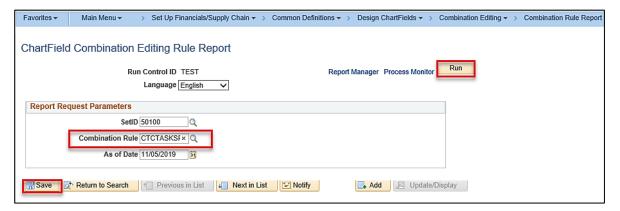## ChartField Combination Editing Rule Report

Unlike the **Review Combination Data Inquiry** page, this report includes all data relating to valid ChartField combinations that have been entered in Cardinal, whether they have been built during the nightly batch process or not. If a new combination is created, it appears in this report even if the build process has not been run in Cardinal.

1.  Log into Cardinal and navigate using the following path:
    **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Combination Rule Report**

2.  Enter or create a **Run Control ID**.

    **Note**: The **SetID** automatically populates based on the Agency of the user and the **As of Date** also populates automatically based on the current date.
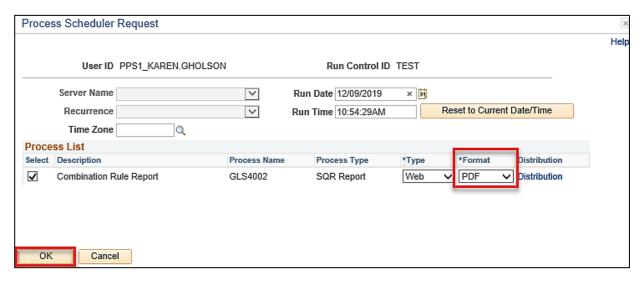


3.  Enter or select (via lookup) a **Combination Rule**.



4.  Click the **Save** button.

5.  Click the **Run** button, which will update the window to the **Process Scheduler Request** page.
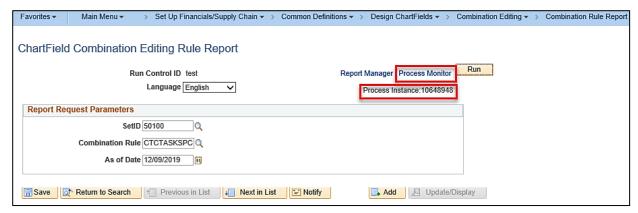
**6.** Check to ensure that the process is formatted as a **PDF** file and then click the **OK** button. This will bring the window back to the **ChartField Combination Editing Rule Report** page.
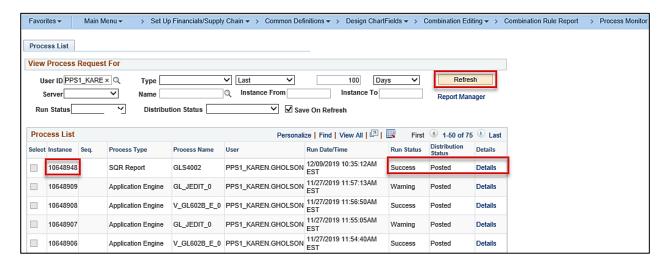


**7.** There should now be a **Process Instance** number below the **Run** box. Click the **Process Monitor** link which will update the window to the **Process List** page.
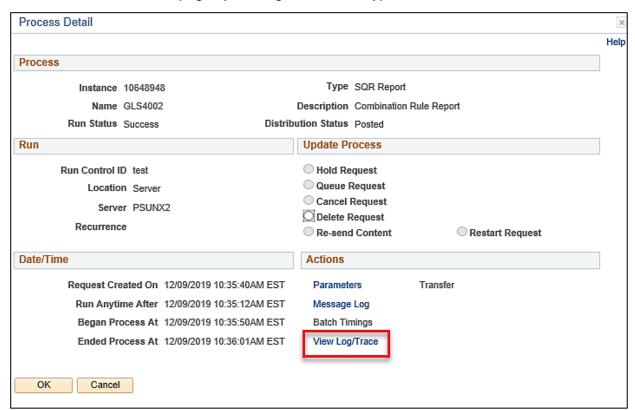
**8.** Click the **Refresh** button until the **Run Status** is **Success** and the **Distribution Status** is **Posted**.

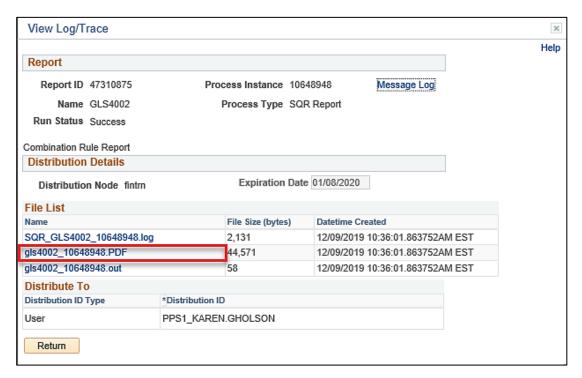**9.** Go to the **Process Detail** page by clicking the **Details** hyperlink.



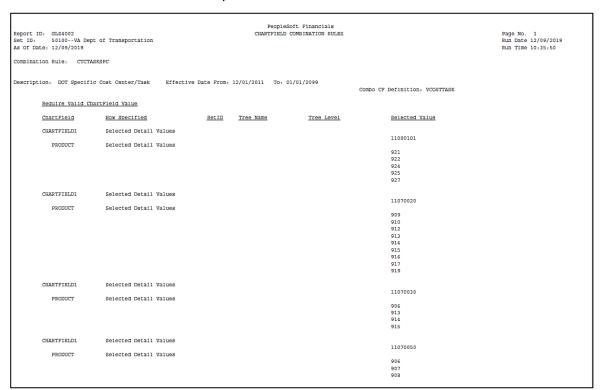**10.** Click the **View Log/Trace** hyperlink, which will update the window to the **View Log/Trace** page.

**11.** Select the **PDF** file to view the report.