Customize the Chartfield Tab Distribution Line

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| 1.   | In this example, we will rearrange the system default Chartfields on the **Reconcile Statement - Account Distribution** page in a more user-friendly, compact order for Berkeley users.  
**Note:** This customization can be performed on any BFS module.  
Another module where customization might be helpful is **Requisition Defaults** (see **Customize the Distribution Chartstring**). |
| 2.   | In this lesson, we have already navigated to the **Reconcile Statement - Procurement Card Transactions** page.  
**Chartfields** are located by clicking on the **Distribution** icon.  
Click the **Distribution** icon. |
| 3.   | The **Account Distribution** page appears, with the chartfields on the **Chartfield** tab in the **Distributions** section.  
Notice that the default display is not the typical UC Berkeley **Chartstring** arrangement; and you cannot see the two fields **ChartField1** and **ChartField2**, which are further down the PeopleSoft chartstring. |
| 4.   | The **Chartfields** are located at the bottom of the page and extend off to the right. The **Customize** link is also on the right.  
Click the horizontal **Scrollbar** at the bottom of the page so we can view the right side of the page. |
| 5.   | We can now see the two other fields Berkeley uses, **ChartField1** and **ChartField2**.  
We will customize them (move them in the chartstring).  
Click the **Customize** link. |
| 6.   | A page opens with a display of the current **Column Order** (from left to right) of the **Chartfields** tab.  
**NOTE:** It is recommended **not** to use the **Hidden** or **Frozen** checkboxes because we might be using these fields later. |
| 7.   | The **Berkeley Chartfields** used in our chartstrings are circled; we will now move **ChartField 1** and **ChartField 2** up the list to be displayed after **Program**.  
Additionally, we will move **Alt Acct** out of the way by moving it down the list. |
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| 8.   | To move an item up or down the list, we must select it and then use the arrow navigation buttons near the top of the column.  
Click the **ChartField 1** list item. |
| 9.   | We will move both **Chartfield 1** and **Chartfield 2** up together.  
Press the **[Ctrl]** key and click the **ChartField 2** list item. |
| 10.  | **Chartfield 1** and **Chartfield 2** are now both selected.  
Click the **Move Up** button to move them up one position. |
| 11.  | We will continue clicking the **Move Up** button until these two fields are just below **Program**.  
Click the **Move Up** button. |
| 12.  | Click the **Move Up** button. |
| 13.  | Click the **Move Up** button. |
| 14.  | Click the **Move Up** button. |
| 15.  | **ChartField 1** and **Chartfield 2** are now just below **Program**.  
Our Berkeley Chartstring arrangement is now grouped together but still includes the **Alt Acct** field.  
We now want to move **Alt Acct** down the list and out of the way to complete our customization.  
Click the **Alt Acct** list item. |
| 16.  | Click the **Move Down** button to move **Alt Acct** down one position. |
| 17.  | We will continue clicking the **Move Down** button until this field is just below **Chartfield 2**.  
Click the **Move Down** button. |
<p>| 18.  | Click the <strong>Move Down</strong> button. |
| 19.  | Click the <strong>Move Down</strong> button. |</p>
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<td>20.</td>
<td>Click the <strong>Move Down</strong> button.</td>
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<tr>
<td>21.</td>
<td>We now see the Berkeley chartstring fields together on a single screen in the order we use them.</td>
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</table>
| 22.  | To confirm the new arrangement, use the **Preview** feature at the bottom of the page.  
Click the **Scrollbar** to scroll down. |
| 23.  | Click the **Preview** button. |
| 24.  | The **Distribution** line at the bottom of the page now displays the Chartstring order used by Berkeley.  
If the Chartstring order was not correct, you would use the **Cancel** button to return and make additional changes.  
The changes we made are correct. To accept the customization, click the **OK** button. |
| 25.  | You have successfully customized the **Distribution Line** on the **Chartfield** tab in **Reconcile Statements**.  
Now, when you return to this page in the future, the chartfields will be in the order that we use them at Berkeley.  
Remember, customizations are 'module specific' and must be made for each module, i.e. financial journals, budget journals.  
**End of Procedure.** |