Customize the Distribution Chartstring

In this example, we will customize and rearrange the system default Chartfields so that the fields used by Berkeley can be regrouped in a more user friendly order. The resulting customized order will be a more compact display of the fields we use.

Note: This customization can be performed on any BFS module.

In this example, we will use the Requisition page. Another module where customization might be helpful is Financial Journals.

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| 1. | In this lesson, we have already navigated to the first page of a new **Requisition**.  

**Chartfields** are located by navigating to the **Requisition Defaults** page.  

Click the **Requisition Defaults** link. |
| 2. | Notice that the default display is not the typical UC Berkeley **Chartstring** arrangement; you cannot see the two fields **ChartField1** and **ChartField2** are further down the PeopleSoft chartstring.  

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. |
| 3. | We can now see the two other fields Berkeley uses, **ChartField1** and **ChartField2**.  

We will customize them (moving them in the chartstring).  

Click the **Customize** link.  

| 4. | The **Personalize Column and Sort Order** page opens with a display of the current **Column Order**. The initial view (Left column) shows the Column Order as delivered from PeopleSoft.  

NOTE: It is recommended **not** to use the **Hidden** or **Frozen** checkboxes because we might be using these fields later and you it might be helpful to remember how your chartstring is customized.  

|
6. 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.

7. 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.

8. Click the Move Up button to move ChartField 1 just below Program.

Note: in this lesson, it will only take 1 click but in the actual system you will have to click the Up button 5 times to move the item up 5 places.

9. Notice you have moved ChartField 1.

Click the ChartField 2 list item.

10. Click the Move Up button to move ChartField 2 below the ChartField 1.

11. 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.

12. Click the Move Down button to relocate this field after ChartField 2.

13. We now see the Berkeley chartstring fields together in the order we use them.

This customization will provide a chartstring view on a single page and will assist in User's confirming chartstrings entered without having to scroll the page.

14. To confirm the new arrangement, use the Preview feature at the bottom of the page.

Click the Preview button.
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| **15.** | The **Distribution** line at the bottom of the page now displays the Chartstring order used by Berkeley.

Should the view not be 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. |
| **16.** | Congratulations, you have successfully customized the **Chartfield** arrangement.

Remember, customizations are 'module specific' and must be made for each module, i.e. financial journals, budget journals. **End of Procedure.** |