Finance System Step-by-Step Guide
Journal Entry Change Values

What is the Change Values Function?

The Change Values function in the Journal Entry component provides a quick means of replacing certain ChartField values on multiple lines of the JE. This applies to any type of journal (actual, budget, etc.).

How to Change ChartField Values

After you have created the lines of your journal, you may need to change some of the information. For example:

- You used a specific Account value a number of times to classify a specific transaction and now you learn that your department prefers to categorize it differently; *or,*
- You realize that you've repeatedly debited the wrong SpeedType.

At this point, you could update each affected line, one by one…or you could take advantage of the Change Values function for a quick update of multiple lines.

To begin, be sure that the lines you want to change are displayed on the journal Lines page. Click the **Change Values** link in the upper portion of that page.

Note: Values will be changed for only the lines that appear on the Lines page at the time that you click Change Values. If you have additional lines to update, display them on that page and then make the change again. Or – in the beginning – change the default number of lines displayed (using the icon in upper right – not visible in screenshot below) so that all lines you want to change are shown on a single screen.

On the new Change ChartField Values screen, using the appropriate rows, identify the value(s) you want to change From and To. Notice that SpeedType itself is not listed. That's because SpeedType is a calculated value (based on the FOPPS). To change SpeedType, simply identify whichever FOPPS fields you need to change in order to produce the desired SpeedType.

✓ **Be sure to check the Selected checkbox**
This checkbox must be checked for every ChartField value you want to change. In the sample screen below, we are only changing values for one ChartField (Account).

Click OK.

You'll return to the journal Lines page – and the lines displayed will show the changes.

Notes:
Changing the Account ChartField value of a line does **not** change the value displayed in the Journal Line Description field.

The Alternate Account ChartField is not used at CU.