



SPLITTING A CHARTFIELD

- Chartfields can be split to distribute a requisition's amount across multiple funding sources similar to eReq functionality. There are two ways to split a transaction:
- Header Level Splits can accommodate a % of price, or % of quantity and is applied to all lines in the cart. This limitation is applied to ensure systematic rounding estimations do not cause downstream encumbrance issues.
- Line Level Splits allow the you to split chartfield information by % of price, % of quantity, amount of price, or amount of quantity and apply to that particular line. This option should be used to achieve exact dollar amount distributions.

HEADER LEVEL SPLITS

 Chartfield splitting occurs during requisition checkout. Once you have built your cart and clicked View Draft, click on the Chartfields tab of the checkout process, then click on Edit to the right of the chartfield string.

Summary	Shipping	Bill Chartfields	mal Notes and Attachments	Supplier Info	Taxes/S&H			8
								Hide value descrip
				Chartfields				
			These values app	ly to all lines unless	specified by line item			
Bus	iness Unit	Fund	Department	Progra	m Pro	oject	Budget Year	edi
1	WSQ01	25 Gov't & Comi, Grants/Contracts	67230 Canology & Comprehensive Care			936 actobacilli Asso	2016	

2. A new dialogue box will appear. Click the Add Split button. A new chartfield row will appear. **Note:** you can click this button multiple times to add additional rows to the split distribution.

					? X
partment	Program	Project	Budget Year	% of Price	add split
		F6936	2015	0	remove
om all values	Select from all values	Select from all values	Select from profile values Select from all values		

3. Once the desired number of rows has been added, the appropriate chartfield elements can be entered. Chartfields can be entered directly or searched in the directory by clicking **Select from all values**. Clicking on **Select from Profile Values** will allow you to choose from a list of saved default chartfields, if you have set any (review the Customizing your Profile and Setting Defaults Tip Sheet for more information).

4. Once you have clicked **Select from all values** (depending on the chartfield component you are searching for), you will either be presented with a drop-down list of values or dialog box allowing you to search by value or description.

Chartfields (use capital lett	ers)	https://usertest.sciquest.com/apps/Router/CFValueSearchPopup?Cl			
Business Unit	Fund	A https://usertest.sciquest.com/apps/Router/CFValu			
WSQ01	25	Custom Field Search ?			
Select from profile values	Hide all values	Value			
WSQ01	25	South			
Select from profile values Select from all values	Select from all values				

- 5. After entering the chartfields, you will need to select a split method (either % of price or % of quantity) that will be applied to all of the lines in your cart.
- 6. Once you are satisfied with your split distribution entry, click **Save** to finalize. Continue with the checkout prompts to complete your requisition.

LINE LEVEL SPLITS

 Once you have built your cart and clicked View Draft, click on the Chartfields tab of the checkout process. Scroll down to the individual Requisition lines, then click on Edit to the right of the chartfield string you wish to change.

	APLES INC more info.	1000500000	7223922079000		000000000	1000000000	
	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	1
1	Surgir file Point Premanent Markers, Bick, Dorms Box	125328	DZ	6.35	150 DZ	952.50 USD	
	Office Supples						
2	Stapler Top-Tab Tile Fakters, U.J. Cut, Manika, LTTFR-size Holds B (J2 + 11', 100/Tile https://maps/staplerid.com/Unipag/Staple/000/DB18,277 StatistSSdefaaltmage-automicinguoud_u2	116657	BX	6.97	250 BX	1.742.50 USD	
	W values have been overridden for this line						
	Account						
	63110 Office Supplies						





2. A new dialogue box will appear. Click the Add Split button. A new chartfield row will appear. Note: you can click this button multiple times to add additional rows to the split distribution.

Select from your code favo	rites	•					
Business Unit	Fund	Department	Program	Project	Budget Year	% of Price	add split
WSQ01	10	19600			2016	0	remove
Select from profile values Select from all values	Select from profile values Select from all values						
WSQ01	10	19600			2016	p	remove
Select from profile values Select from all values	Select from profile values Select from all values						
					Solit Tota	1 0%	add split

- 3. Once the desired number of rows has been added, the appropriate chartfield elements can be entered. Chartfields can be entered directly or searched in the directory by clicking Select from all values. Clicking on Select from Profile Values will allow you to choose from a list of saved default chartfields, if you have set any (review the Customizing your Profile and Setting Defaults Tip Sheet for more information).
- 4. Once you have clicked **Select from all values** (depending on the chartfield component you are searching for), you will either be presented with a drop-down list of values or dialog box allowing you to search by value or description.



- 4. After entering the chartfields, you will need to select a split method (either % of price or % of quantity).
- 5. Once you are satisfied with your split distribution entry, click **Save** to finalize. Continue with the checkout prompts to complete your requisition.