Pcard Place Personalizing Columns in Pcard Place

revised12.15.2020

Summary

This document will explain how to arrange the fields in the proper order making it easier to reallocate.

You must have at least one transaction to reallocate

Procedure

Step 1. Log into MyFin https://psfin.slcounty.org/

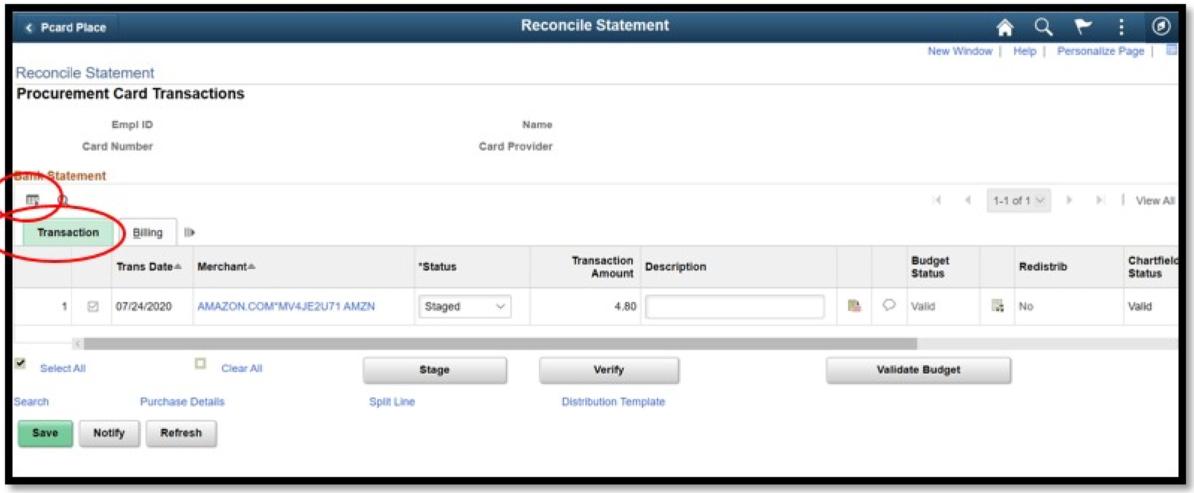
Enter **Username** - Same as PeopleSoft timesheet

Enter **Password** - Same as PeopleSoft Timesheet

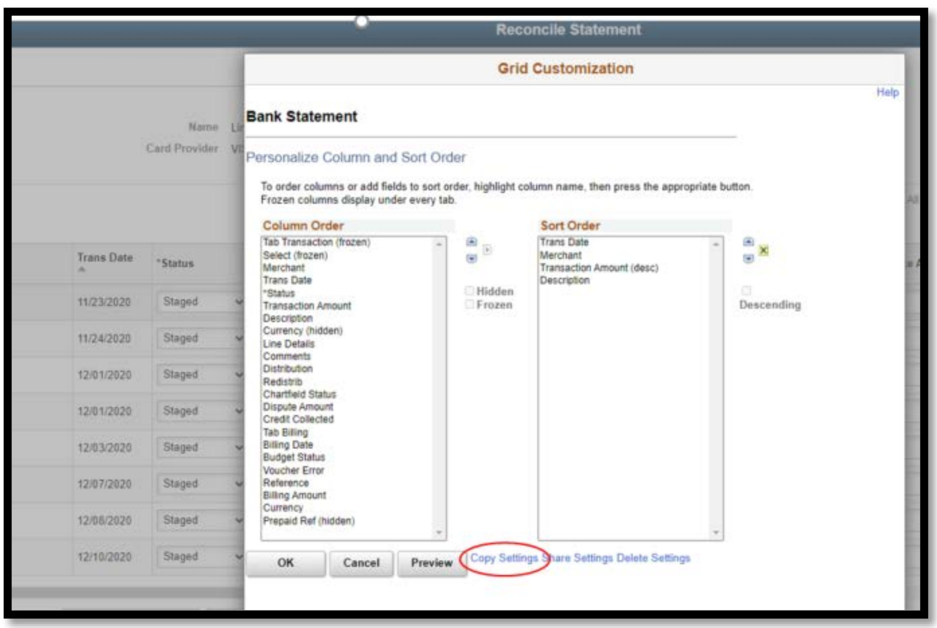
Step 2. Click on **My Pending Transactions** tile to view your transactions.

Step 3. Click on **Grid Action Menu**  **icon.**

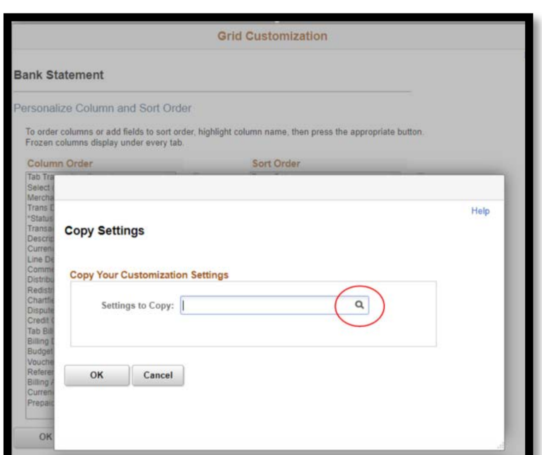
Step 3a. Select **Personalize.**



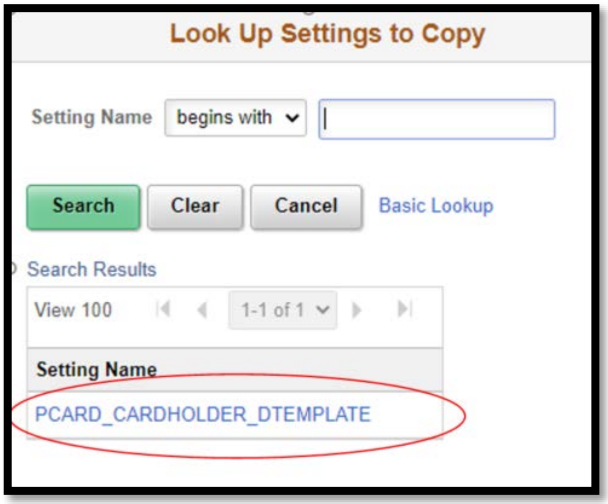
Step 4. Once in the Grid Customization, scroll down to where it says **Copy Settings** in blue at the very bottom.



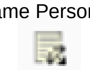
Step 4a. Click on the magnifying glass of the **Settings to Copy**

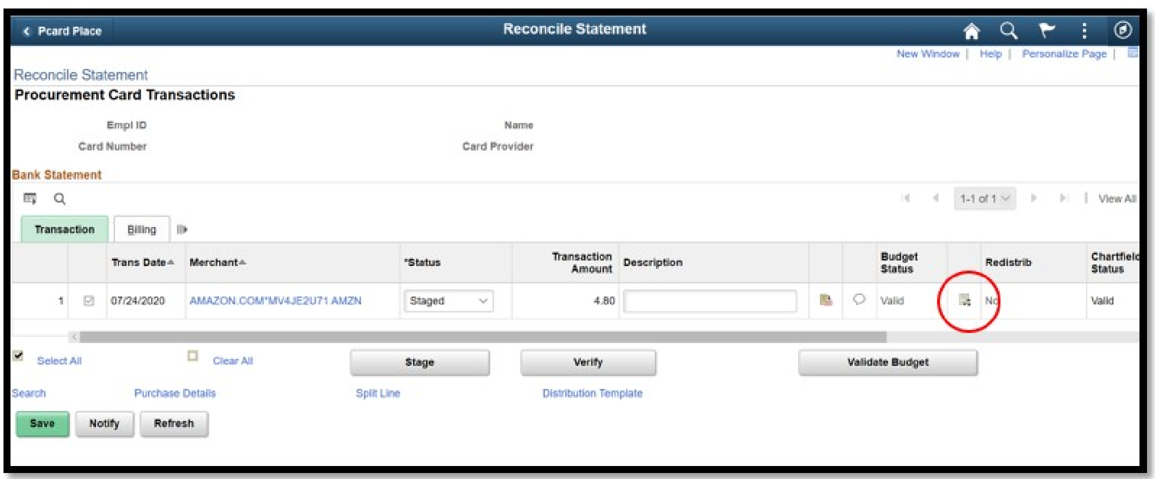


Step 4b. There will only be on Setting named **PCARD_CARDHOLDER_DTEMPLATE**. Click on the setting and click **OK** twice. Your columns will now be rearranged to reflect all the training instructions.



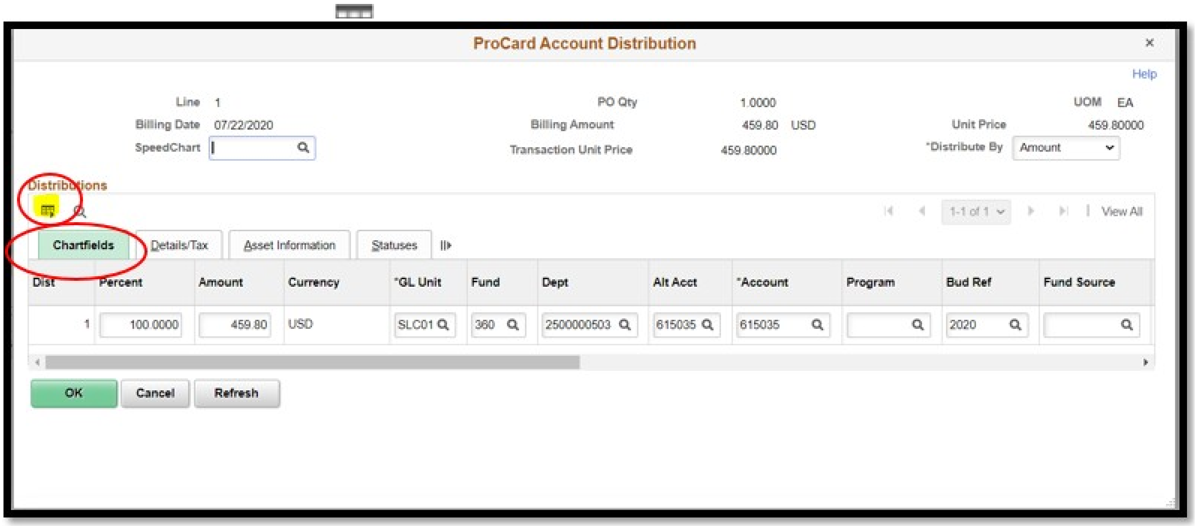
Step 5. You will repeat this same Personalization in the Distribution area of the Reconciliation screen.

Step 5a. Click **Distribution icon**  for the transaction you need to reallocate.

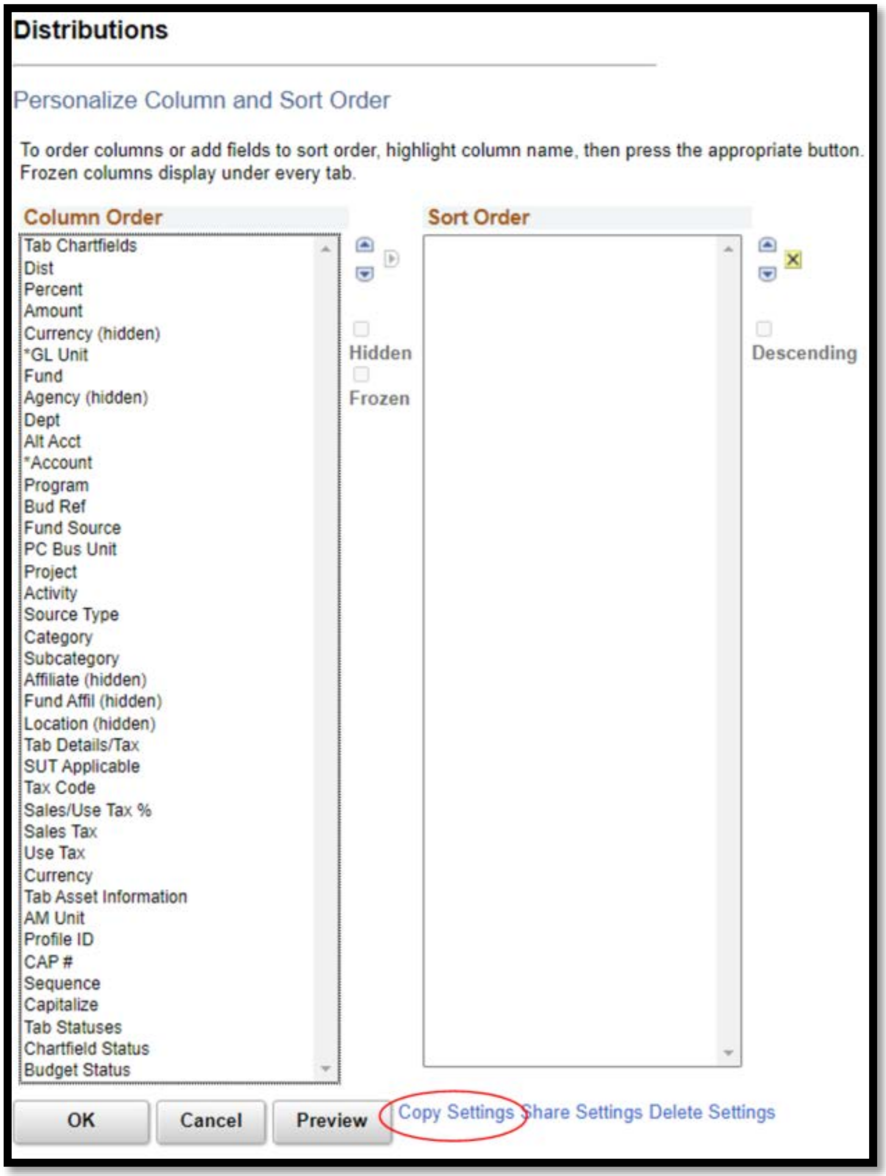


Step 6.. Click on **Grid Action Menu** **icon.**

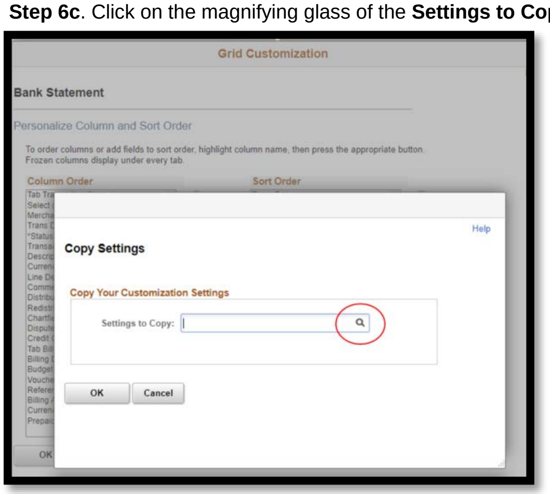
Step 6a. Select **Personalize.**



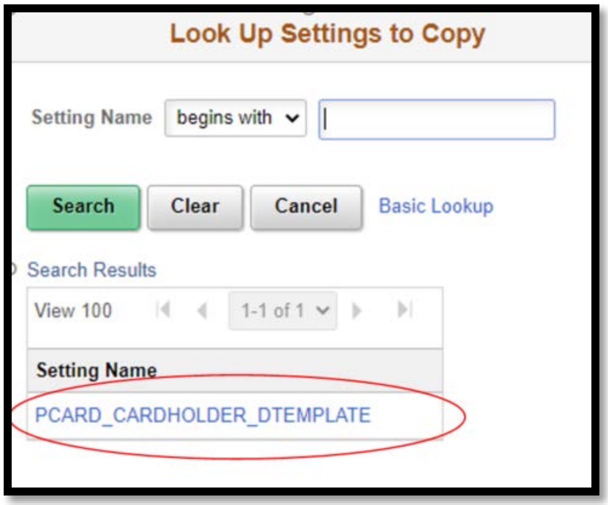
Step 6b. Once in the Grid Customization, scroll down to where it says **Copy Settings** in blue at the very bottom.



Step 6c. Click on the magnifying glass of the **Settings to Copy**



Step 6d. There will only be on Setting named **PCARD_CARDHOLDER_DTEMPLATE**. Click on the setting and click **OK** twice. Your columns will now be rearranged to reflect all the training instructions.



The fields are now arranged in the proper order and you are ready to begin

reallocating. Refer to the ***Pcard Place Reallocation***