Customizing ChartFields

myUFL users may find they frequently use certain ChartFields more than others when entering transaction information. This task can be made easier by customizing (personalizing) a ChartField line. Use this instruction guide to learn how to complete the following:

- **Hide** – Hide specific ChartFields to prevent them from being displayed
- **Freeze** – Freeze specific ChartFields to prevent them from being moved
- **Order** – Position ChartFields in an order, allowing for easier input
- **Sort Order** – Sort ChartField values in order (ascending or descending)

Note that in some myUFL modules, the link is Set Personalizations.

Personalize Column and Sort Order Function

Click the **Customize** (or **Set Personalizations**) link to display the Personalize and Sort Order page.

Hide

To **hide** specific ChartFields and prevent them from being displayed on your ChartField lines:

1. Highlight the ChartFields you want to hide
2. Select the **Hidden** option
3. Note that "(hidden)" appears next to all hidden ChartFields
4. Click the **Preview** button to display a sample of your changes
5. Click the **OK** button

To **un-hide** specific ChartFields
1. Select the ChartField line
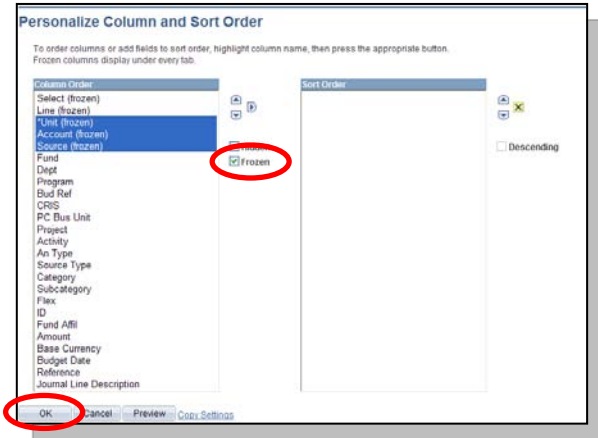2. Remove the checkmark in the **Hidden** checkbox

Freeze

To **freeze** specific ChartFields and prevent them from being moved on your ChartField lines:

1. Highlight the ChartFields you want to freeze
2. Select the **Frozen** option
3. "(frozen)" appears next to all hidden ChartFields
4. Click the **Preview** button to display a sample of your changes
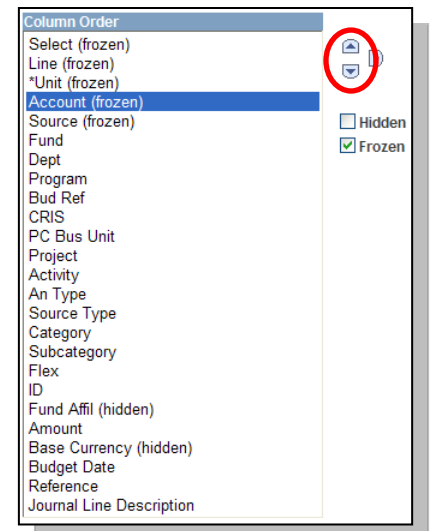5. Click the **OK** button

To **un-freeze** a ChartField
1. Select the ChartField
2. Remove the check in the **Frozen** checkbox
3. Click the **OK** button

Order

Follow these steps to change the order of the ChartFields on your ChartField line:

1. Select the ChartField you want to move
2. Use the up and down arrow buttons to move the ChartField up or down on the list
   - Moving a ChartField up the list will move the ChartField to the left on the ChartField line
   - Moving a ChartField down the list will move the ChartField to the right on the ChartField line
3. Click the **Preview** button to display a small sample of your changes
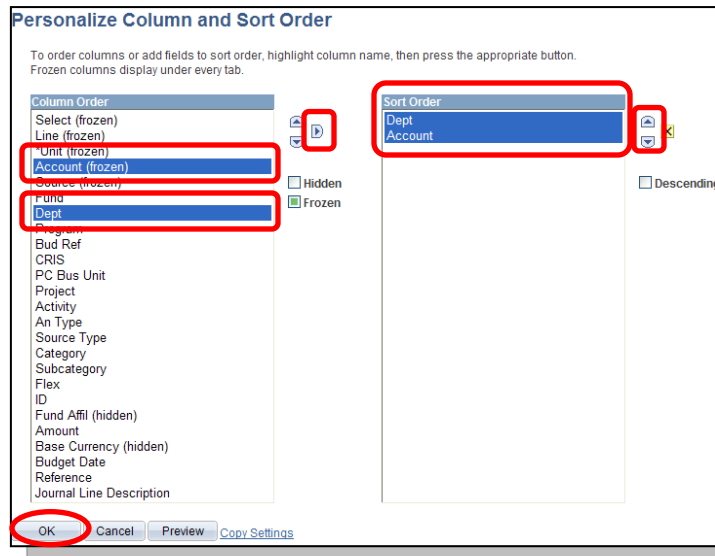4. Click the **OK** button

Sort Order

Follow these steps to change the order in which the ChartField values are sorted when displayed on a page:

1. Select the ChartFields your want to Sort Order
2. Use the arrow button to move the ChartField to the Sort Order box
3. Use the up and down arrows to order your sort
4. By default, your items will be in ascending order
   - Select the **Descending** option to change the sorting order
5. Click the **Preview** button to display a sample of your changes
6. Click the O**K** button

In the example below, the sort order will sort ChartFields in ascending order first by Dept ID, then by Account Code.

Note the ChartFields are ordered first by **Dept** (ascending) then by **Account** (ascending).