

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.

The screenshot shows the myUFL interface with the 'Customize' button circled in red. The interface includes tabs for Header, Lines, Totals, Errors, and Approval. The 'Lines' tab is active, showing a table with columns: Select, Line, *Unit, Account, Source, Fund, Dept, Program, Bud Ref, CRIS, PC Bus Unit, and Project. The 'Unit' is UFLOR and the 'Journal ID' is NEXT. The date is 04/28/2011. The 'Process' button is also visible.

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

The screenshot shows the 'Personalize Column and Sort Order' dialog box. It has two panes: 'Column Order' and 'Sort Order'. In the 'Column Order' pane, the 'Hidden' checkbox is circled in red. The 'OK' button is also circled in red. The dialog box includes instructions: 'To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.'

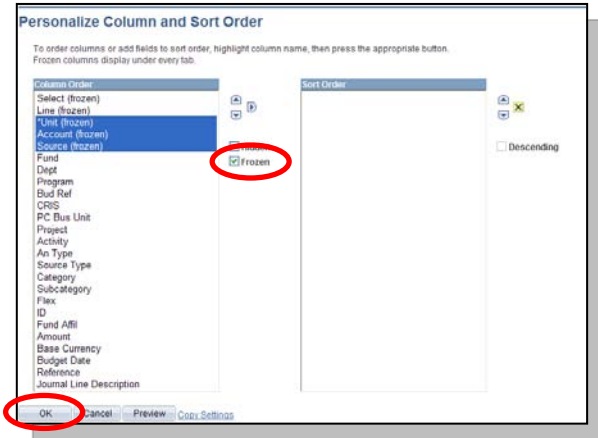
Freeze

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

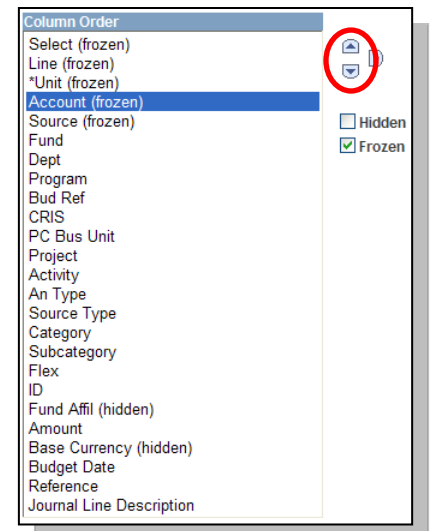
1. Select the ChartField
2. Remove the check in the **Frozen** checkbox
3. Click the **OK** button



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

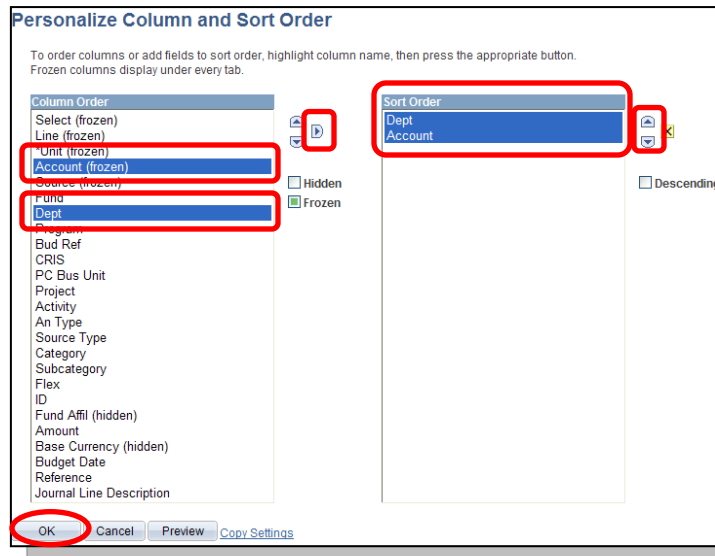


Sort Order

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

1. Select the ChartFields you 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 **OK** 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).

Select	Line	*Unit	Account▲	Fund	Dept▲
<input type="checkbox"/>	3	UFLOR	813110	149	26060100
<input type="checkbox"/>	1	UFLOR	813200	149	26060100
<input type="checkbox"/>	4	UFLOR	813110	149	26080100
<input type="checkbox"/>	2	UFLOR	813200	149	26080100
<input type="checkbox"/>	9	UFLOR	813110	143	32030000
<input type="checkbox"/>	12	UFLOR	813110	143	32030000