OVERVIEW

Use the Personalize link to rearrange data entry fields on a page in myUFL to make entering and viewing information easier. You may move fields where they will be easy to find and use. Place them in a convenient order to avoid tabbing over fields that you do not use.

It is strongly recommended you use the Personalize link on the Accounts Distribution page to move ChartFields you regularly use to the left side of the page to avoid tabbing over fields each time.

STEPS

Navigate to the Reconcile Statements page in myUFL:

1. Click Main Menu
2. Click Financials
3. Click Purchasing
4. Click Procurement Cards
5. Click Reconcile
6. Click Reconcile Statement

Search for and retrieve statements for the PCard holder needed:

1. Click the Look Up Employee ID (Alt+5) button.
2. Click the Look Up button to view the cardholders list and click on the link needed to select.
3. Click the Search button.

You can move a field to the front page permanently using the steps below. This needs to be done only once. Let’s use the Description field as an example. By default, the Description field is under the Billing tab.

1. Click the Personalize link to change the positions of the columns and to move this field to the front page under the Transactions tab.

2. Click the Description list item to select it.
3. Click the Move Up button repeatedly until the Description item is in the fourth position from the top on this list.
4. Click the OK button.

The Description column should now be on the front page (Transaction tab) for easy viewing and entering of information. It is **very important** that there is no information in the Sort Order field on the right.

For additional help, please contact the PCard Team at 392-1331 or visit the [PCard website](http://www.pcard.ufl.edu) or e-mail [pcard@ufl.edu](mailto:pcard@ufl.edu).