**ChartField Personalization Quick Guide**

Employees may find that they are frequently changing the value of certain ChartFields more than others when editing accounting information. This task can be made easier by personalizing the order individual ChartFields appear in Default Accounting ChartField strings.

**Customizing ChartField Order**

The order of ChartFields can be personalized anywhere in the Financials system where GL ChartFields are used. For example, the default ChartField order for Travel Authorizations looks like the following:

1. Click **Set Personalizations**.
2. Click on the **ChartField** header you wish to move.
3. Using the ▲ and ▼ buttons, move the **ChartField** header to the desired location in the list.

This loads the **Personalize Column and Sort Order** page, where ChartField order can be customized:

![Personalize Column and Sort Order](image)
To prevent a ChartField from being displayed, select the ChartField header from the list and check the Hidden box:

![Hidden and Frozen checkboxes](image)

To prevent a ChartField header from being moved in a ChartField string, select the ChartField header from the list and check the Frozen box:

![Hidden and Frozen checkboxes](image)

The Preview button displays a sample ChartField string using the current Column Order.

Click OK to save changes to the ChartField order.
A personalized ChartField order for the Financials Travel and Expenses: Travel Authorization module looks like the following:

![ChartField Order Example](image)

### Sharing and Copying Settings

Once ChartField personalizations have been set by clicking **OK**, they can be shared with other users.

1. Click on the **Share Settings** link.

2. Choose whether you’d like the settings to be **Private** (default) or **Public**.

3. Enter a Name for the settings if you chose the **Public** option.

The **Share Settings** page has two options: **Private** and **Public**. If you choose to make the customization settings Public, all customization settings for all pages in that component will be public.
The settings are now available for other employees to use. This is done via the Copy Settings link:

1. Click on the Copy Settings link.

2. Enter the name of the custom settings, or search for available settings by clicking .

Your custom settings then match the copied settings:

Sort Order
The Sort Order box determines how entire ChartField strings are sorted when displayed on a page. For instance, the following sort order will sort Chartfield strings in ascending order first by DeptID, then by Class, followed by Program:
The **Preview** option sorts ChartField strings using the current sort order:

Move individual ChartFields to the **Sort Order** box using the **P** button:

By default, sorting is done in ascending order – smallest to largest. Check the **Descending** box to sort a ChartField value in descending order instead:
ChartField strings are now sorted first by DeptID in descending order:

<table>
<thead>
<tr>
<th>GL ChartField 1</th>
<th>Set Personalizations</th>
<th>Find</th>
<th>First</th>
<th>1-3 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>% GL Unit</td>
<td>DeptID</td>
<td>Fund</td>
<td>Project</td>
<td>Program</td>
<td>Class</td>
</tr>
<tr>
<td>25.00 UMS08</td>
<td>80000010</td>
<td>00</td>
<td>80101</td>
<td>06</td>
<td></td>
</tr>
<tr>
<td>50.00 UMS03</td>
<td>80000001</td>
<td>00</td>
<td>80051</td>
<td>02</td>
<td></td>
</tr>
<tr>
<td>25.00 UMS03</td>
<td>80000001</td>
<td>00</td>
<td>80074</td>
<td>17</td>
<td></td>
</tr>
</tbody>
</table>