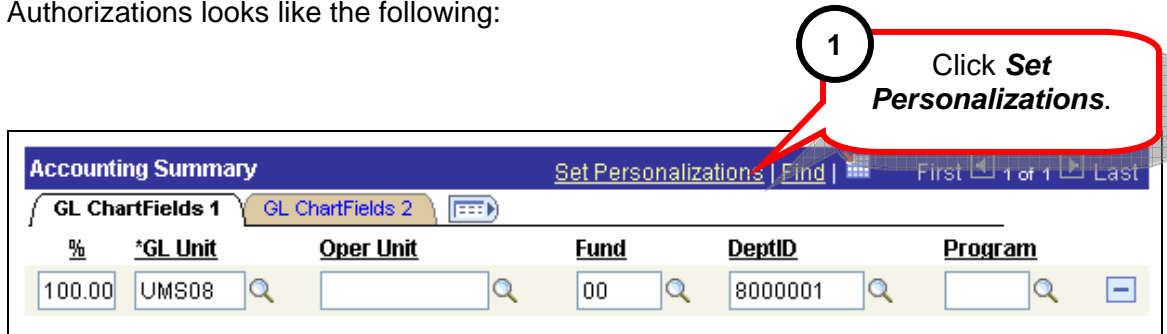


CHARTFIELD PERSONALIZATION QUICK GUIDE

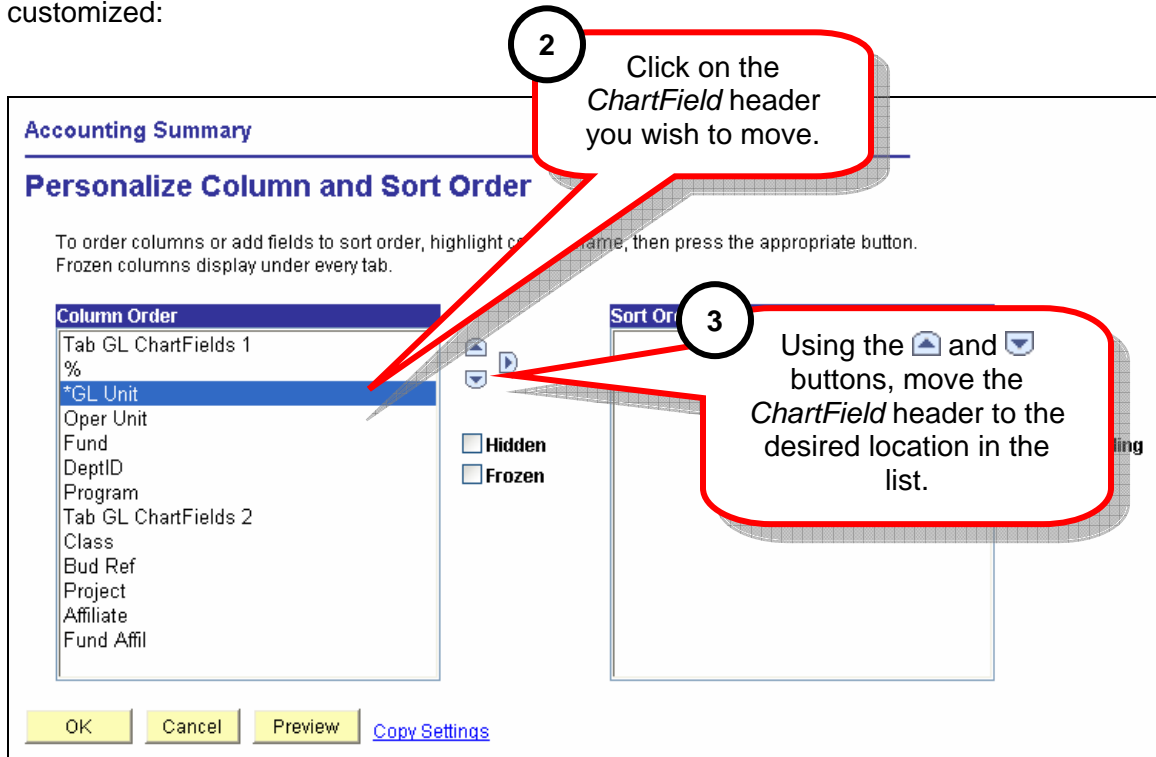
Employees may find that they are frequently changing the value of certain ChartFields more than others when editing accounting information. This task can be made easier by personalizing the order individual ChartFields appear in Default Accounting ChartField strings.

Customizing ChartField Order

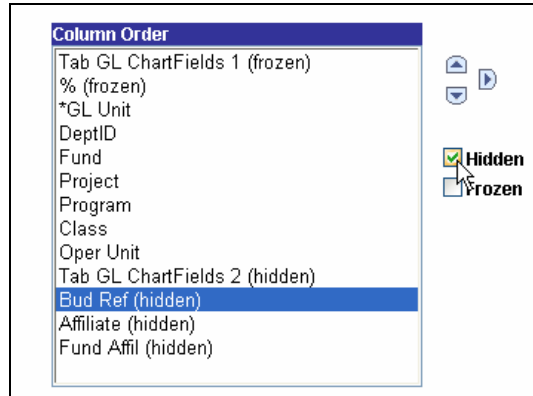
The order of ChartFields can be personalized anywhere in the Financials system where GL ChartFields are used. For example, the default ChartField order for Travel Authorizations looks like the following:



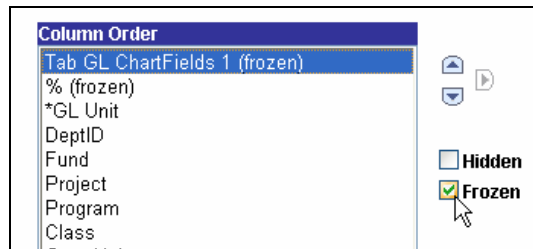
This loads the *Personalize Column and Sort Order* page, where ChartField order can be customized:



To prevent a *ChartField* from being displayed, select the *ChartField* header from the list and check the *Hidden* box:



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



Accounting Summary

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

Column Order

- Tab GL ChartFields 1 (frozen)
- % (frozen)
- *GL Unit
- DeptID
- Fund
- Project
- Program
- Class
- Oper Unit
- Tab GL ChartFields 2 (hidden)
- Bud Ref (hidden)
- Affiliate (hidden)
- Fund Affil (hidden)

Sort Order

Descending

OK Cancel **Preview** Copy Settings

Accounting Summary Set Personalizations | Find | First 1 of 1 Last

GL ChartFields 1		Program	Class	Oper Unit
%	GL Unit	DeptID	Fund	
100.00	UMS08	8000001	00	

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:

Request a Travel Authorization

Default Accounting For This Travel Authorization

Johnny B. Good Travel Auth ID: NEXT

Accounting Summary Set Personalizations | Find | First 1 of 1 Last

GL ChartFields 1

%	^GL Unit	DeptID	Fund	Project	Program	Class	Oper Unit
100.00	UMS08	8000001	00				

Add Refresh

OK

Sharing and Copying Settings

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

Fund Affil (hidden)

OK Cancel Preview [Copy Settings](#) [Share Settings](#) [Delete Settings](#)

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

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:

Share Settings

Share Your Customization Settings

Private

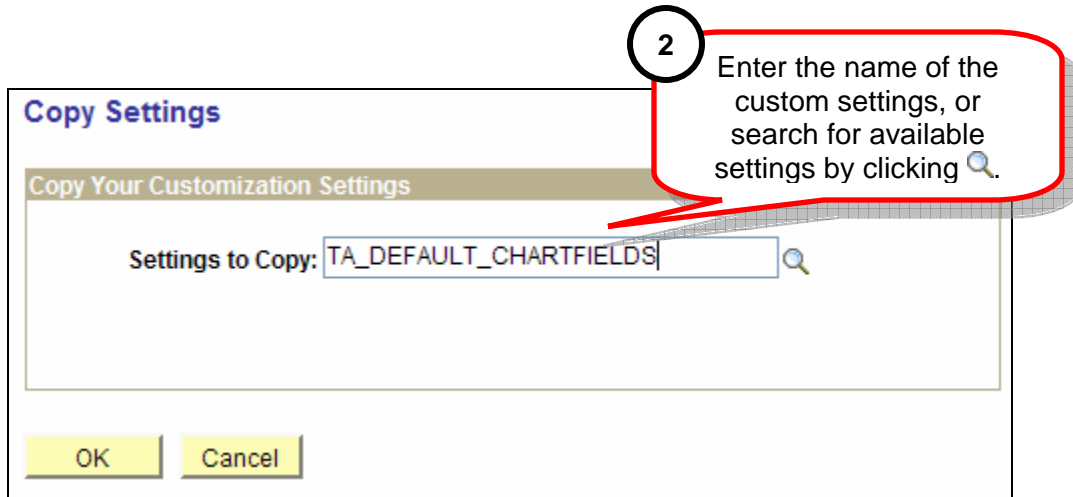
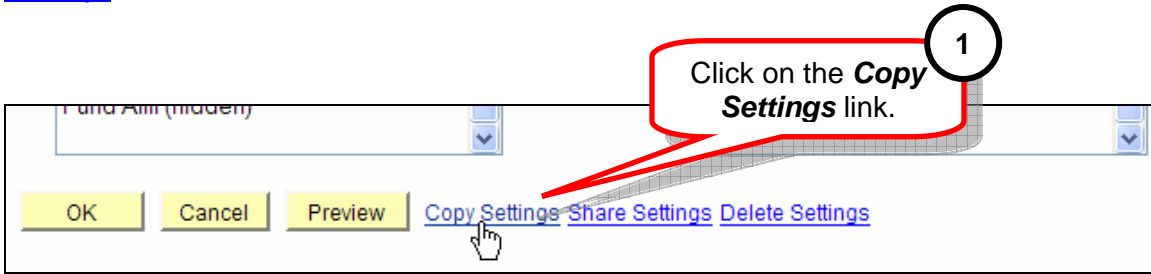
Public Name:
(Name applied to all customization settings for this component)

OK Cancel

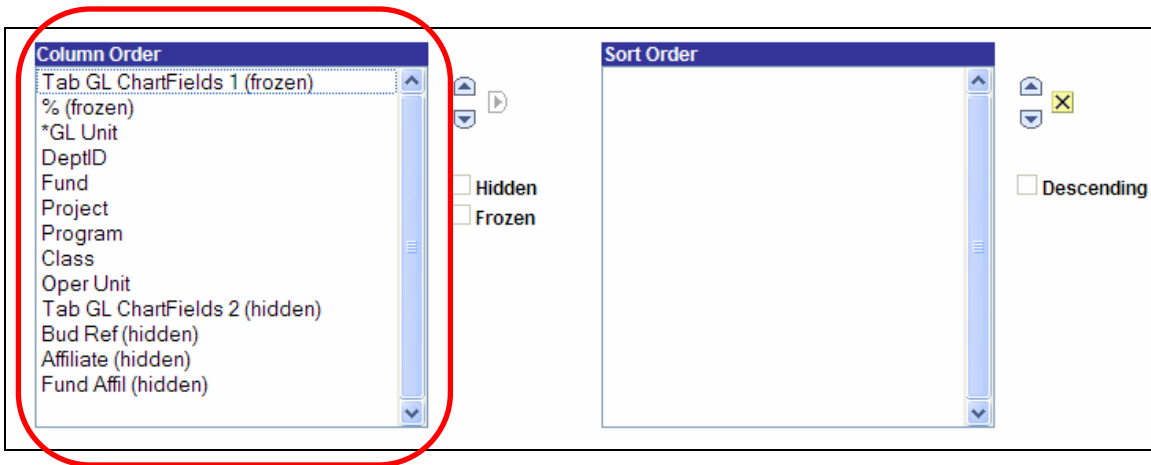
2 Choose whether you'd like the settings to be **Private** (default) or **Public**.

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

The settings are now available for other employees to use. This is done via the [Copy Settings](#) link:

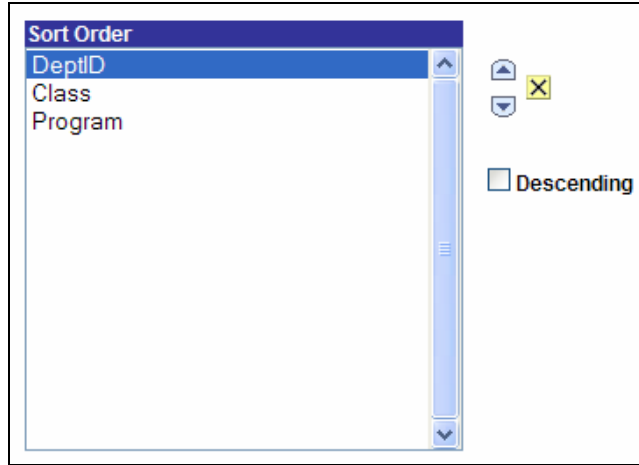


Your custom settings then match the copied settings:



Sort Order

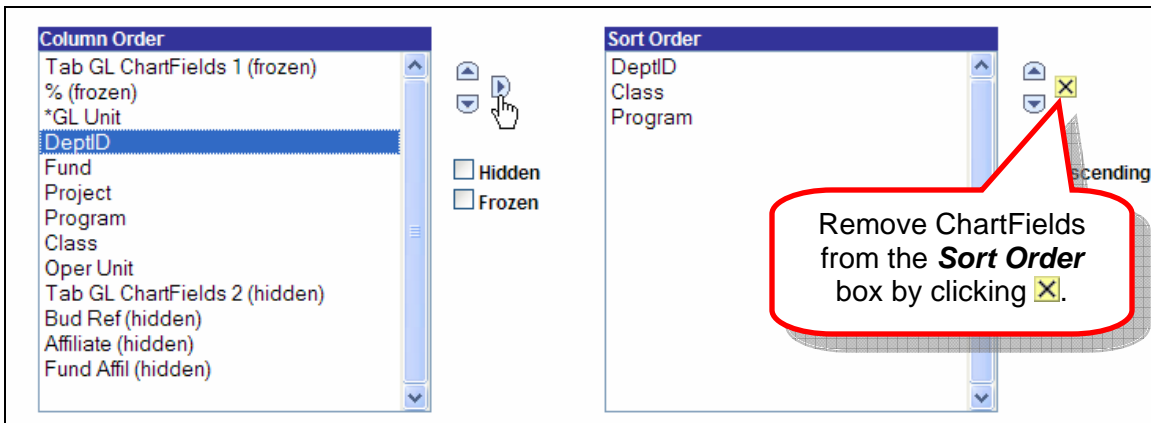
The *Sort Order* box determines how entire ChartField strings are sorted when displayed on a page. For instance, the following sort order will sort Chartfield strings in ascending order first by DeptID, then by Class, followed by Program:



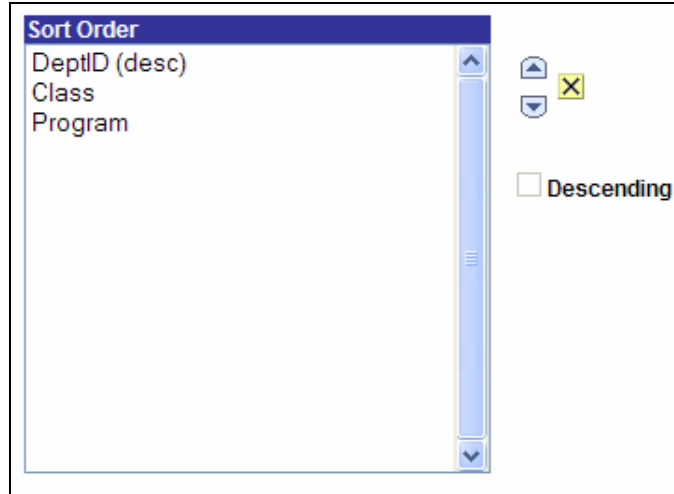
The **Preview** option sorts ChartField strings using the current sort order:

Accounting Summary							
Set Personalizations Find First 1-3 of 3 Last							
GL ChartFields 1							
%	GL Unit	DeptID	Fund	Project	Program	Class	Oper Unit
50.00	UMS08	8000001	00		80051	02	
25.00	UMS08	8000001	00		80074	17	
25.00	UMS08	8000010	00		89101	06	

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

Accounting Summary							
Set Personalizations Find First 1-3 of 3 Last							
GL ChartFields 1							
%	GL Unit	DeptID	Fund	Project	Program	Class	Oper Unit
25.00	UMS08	8000010	00		89101	06	
50.00	UMS08	8000001	00		80051	02	
25.00	UMS08	8000001	00		80074	17	