

FIN How-to: Personalizing Journal Entry Line Display ^[1]

Watch the video

Read the procedures

In FIN, you can make the journal entry lines page easier to use by changing the order of the data entry fields or hiding certain fields. This is called personalizing your journal entry line display.

To personalize your display

1. After creating a journal entry, select the Lines page and click the **Personalize** link.
2. The *Personalize Column and Sort Order*

window appears.

Grid Customization

[Help](#)

Lines

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

Select (frozen)
Line (frozen)
Unit
Ledger
SpeedType
Fund
Org
Program
Project
PC Bus Unit
Activity
An Type
Account
Amount
Reference
Journal Line Description
Source Type
Category
Subcategory
Sub-Class
PC Status (hidden)
Base Currency (hidden)
Stat (hidden)
Stat Amt (hidden)
Budget Date (hidden)

☐ Hidden
☒ Frozen

Sort Order

☐ Descending

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

3. **To change the order of data fields:** Highlight the field you want to move and use the arrows to move it up or down the list. Do this with any other fields you want to move until you have it in the order you want.

If there are fields you think you won't need, consider moving them to the bottom of the list rather than hiding them. They'll be out of the way, but still easily accessible if you need them.

4. **If you do want to hide a data entry field:** Highlight the field you want to hide and select the **Hidden** box.
5. Click **Preview** to view your new line display before saving.

Tip: Save a screenshot of the Personalize Column and Sort Order window! You can use it as a guide if your personalized display ever resets. There are several ways to take a

screenshot. If you're using a PC, you can use the built-in Snipping Tool to capture and save a screenshot.

6. When you're done making changes, click **OK** to save.
7. You'll return on the Lines page where you can see your personalized display.

To return to the default display

1. After creating a journal entry, go to the Lines page and select the **Personalize** link.
2. Select the **Delete Settings** link.
3. A pop up will ask you to confirm you want to delete your customization. To proceed, click **Delete**.
4. Click **OK**.

Have a question or feedback?

Questions & Feedback ^[2]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Source URL:<https://www.cu.edu/controller/fin-how-personalizing-journal-entry-line-display>

Links

[1] <https://www.cu.edu/controller/fin-how-personalizing-journal-entry-line-display>

[2] <https://www.cu.edu/controller/forms/questions-feedback-0>