

Personalizing the Create/Update Journal Entry Columns Job Aid

User Role(s): *Agency GL Processor*
Agency GL Approver
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Overview

This job aid is intended to show how to personalize your journal entry columns to reduce scrolling/tabbing to the ChartFields that are frequently used.

You can personalize the order of the journal columns to best align with your agency's needs by following the steps below.

1. Navigate to the Create/Update Journal Entries page: **NavBar > Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries.**
2. Enter **Business Unit** and click **Add.** **Note:** If this is your first Journal entry, refer to **Online GL Journal Entry** section in the Florida PALM End User Manual for information regarding the data fields.
3. Go to the **Lines** tab on the **Create/Update Journal Entries.**
4. Click **Change Values.**

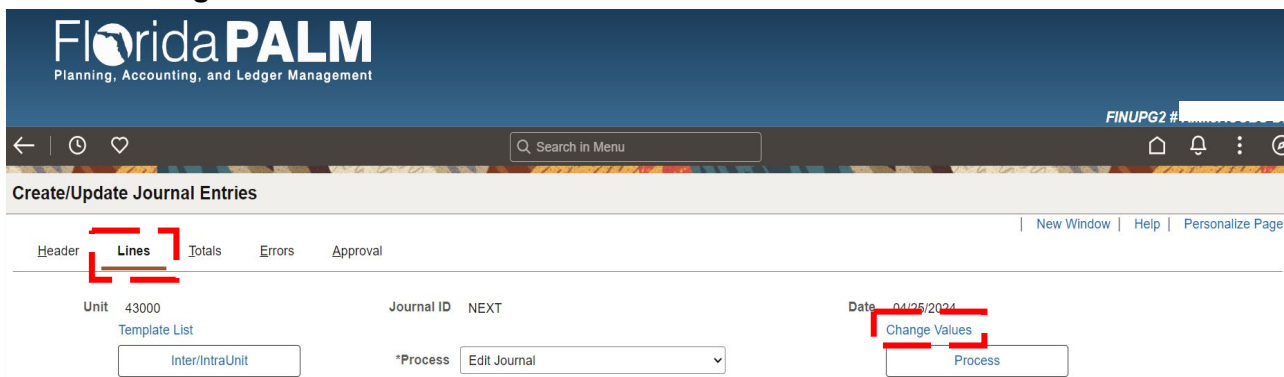


Figure 1: Personalize Page Navigation

5. On the **Change ChartField Values** page, click **Grid Action Menu.**

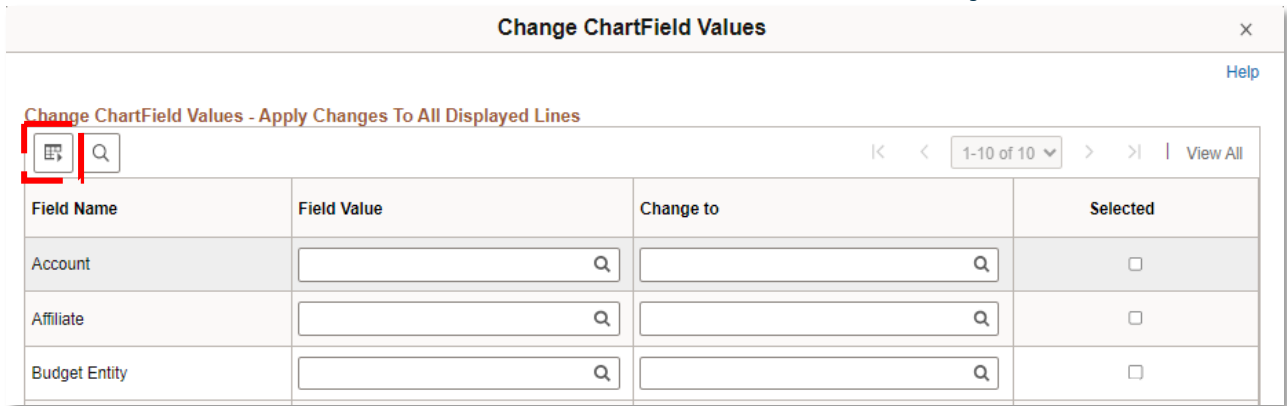


Figure 2: Change ChartField Values Window

6. Select **Personalize**.

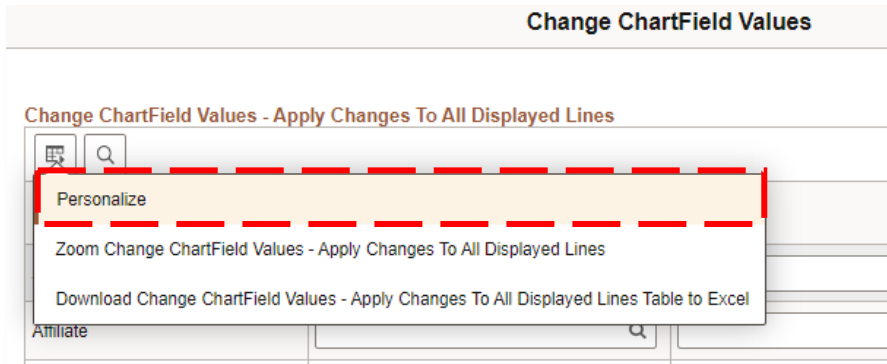


Figure 3: Personalize ChartField Values

7. Organize your column order and/or hide columns you do not need by highlighting the column name then pressing the appropriate navigation arrow button(s).
8. Click **OK** at the bottom to apply your changes.

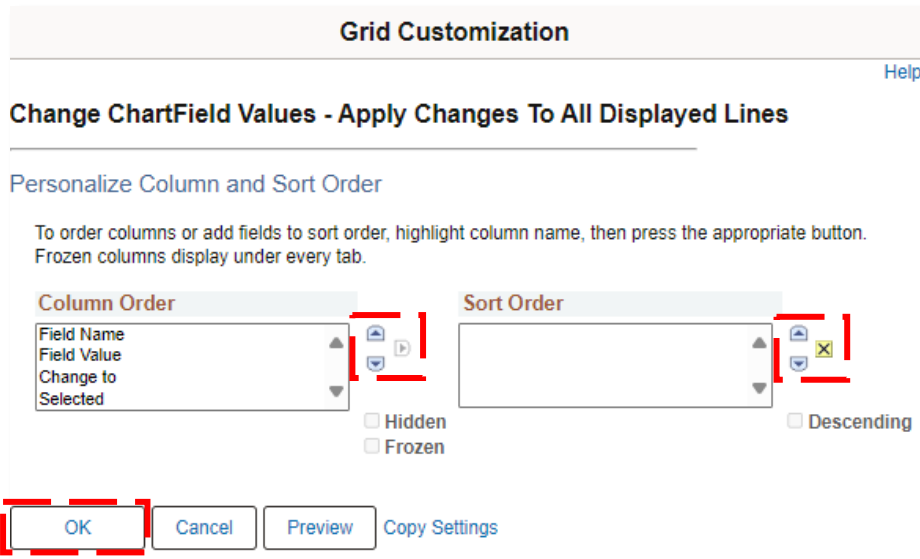


Figure 4: Applying Changes to All Displayed Lines

Once you set your personalization order, Florida PALM will retain your personalized order on future journal entries, saving time and reducing errors when reviewing the disinvestment ChartField entries.

Still have questions?

Please contact the [Florida PALM Solution Center](#).