



Controller's Office – General Ledger Personalize the Journal Entry Lines Tab

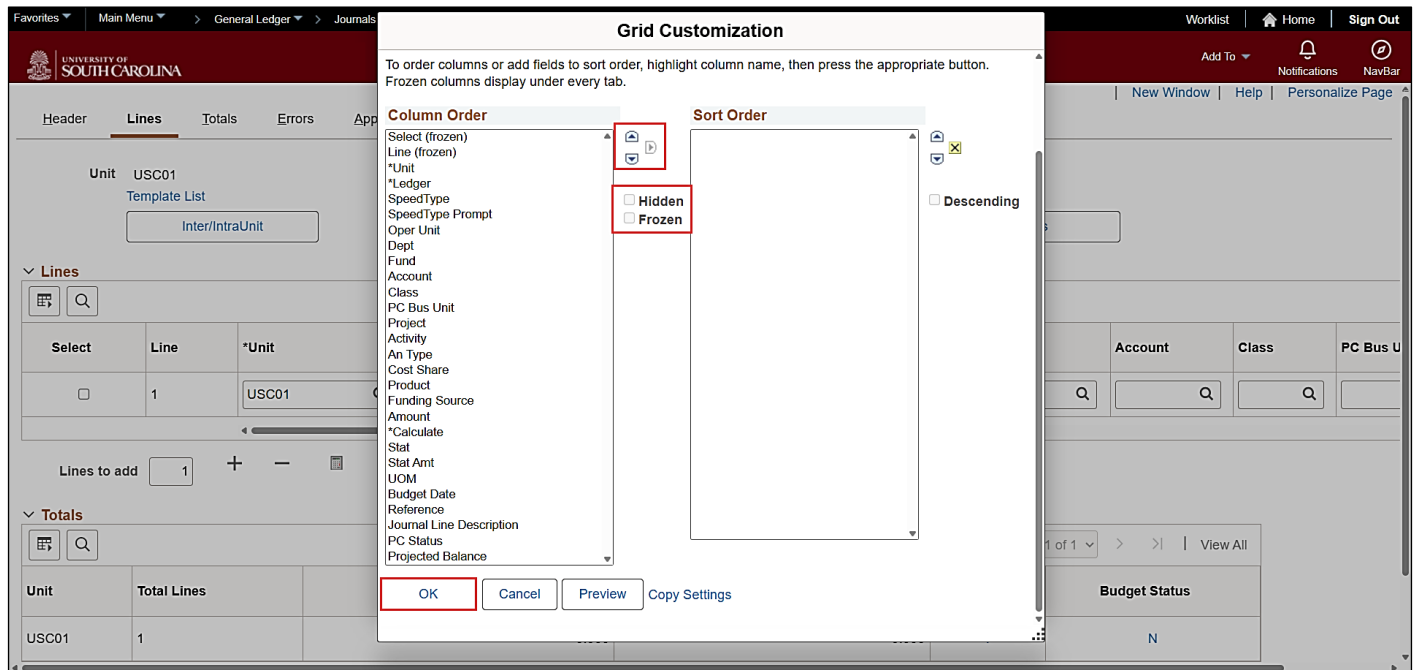
Ever been working on a PeopleSoft journal entry (JE) and become overwhelmed with so many different fields on each line of the entry? Below is information on how to personalize the order of the fields to your individual liking. You can even hide some unused fields or freeze essential ones.

While on the Lines tab of a new or current JE, click the little grid icon on the left of the screen and select the **Personalize** option.

The screenshot shows the PeopleSoft Journal Entry Lines tab. The top navigation bar includes "Favorites", "Main Menu", "General Ledger", "Journals", "Journal Entry", and "Create/Update Journal Entries". The right side of the bar has "Worklist", "Home", and "Sign Out". Below the navigation bar, there is a search bar and a "Journals" dropdown. The main content area has tabs for "Header", "Lines", "Totals", "Errors", and "Approval". The "Lines" tab is active, showing fields for "Unit" (USC01), "Journal ID" (NEXT), "Date" (09/29/2025), and "Process" (Edit Journal). A "Personalize" menu is open on the left, showing options: "Personalize", "Zoom Lines", and "Download Lines Table to Excel". The "Personalize" option is highlighted with a red box. Below the menu, there is a table with columns: *Unit, *Ledger, SpeedType, Oper Unit, Dept, Fund, and Account. The first row shows "USC01" for *Unit and "ACTUALS" for *Ledger. At the bottom, there is a "Lines to add" section with a value of 1 and plus/minus buttons.

*Unit	*Ledger	SpeedType	Oper Unit	Dept	Fund	Account
USC01	ACTUALS					

This will bring you to the **Grid Customization** pop up screen seen below.



Moving a field right or left

- This will allow you to sort the order of fields to fit your specific needs.
- Select the field you wish to move: Line, Unit, Ledger, Department, Account, etc.
- Click the up or down arrows to the right of the Column Order box to move the selected field.
- The up button will move an item to the left on the JE page while the down button will move an item to the right.
- Select the **OK** button to apply changes or the **Preview** button to preview changes before they are applied.

Hide a field

- This will allow you to hide an unused field.
- Select the field you wish to hide.
- Click the **Hidden** box to the right of the Column Order listing. This will remove the field from the JE Lines tab.
- Be careful when hiding fields, as it will not show up at any place on the Lines tab of the JE. Remember, although it may not be a field you use, it will also hide it on entries created by other users that you may be viewing or approving.
- Select the **OK** button to apply changes or the **Preview** button to preview changes before they are applied.

Freeze a field or group of fields

- This will allow you to freeze a group of fields, separating them from the JE Lines tab scrollbar so they always remain in a fixed location on the screen.
- Select the fields you wish to freeze. Note, you can only freeze fields that are in sequence beginning with the first field on your specific list. For example, you can freeze fields one through six, but you cannot freeze only fields three through six. You may need to rearrange fields for the desired result.
- Click the **Frozen** box to the right of the Column Order listing. This will freeze the selected range of fields on the JE Lines tab.
- Select the **OK** button to apply changes or the **Preview** button to preview changes before they are applied.

The above changes will remain in effect each time you log in and out of PeopleSoft. They can always be changed or reversed as needed. If you run into issues, please reach out to the GL team at genacctg@mailbox.sc.edu.