

QUICK REFERENCE GUIDE

February 20, 2024

Personalize Default Settings on Pages and Distribution Lines

You can personalize the default settings to how SWIFT displays default settings on pages and distribution lines.

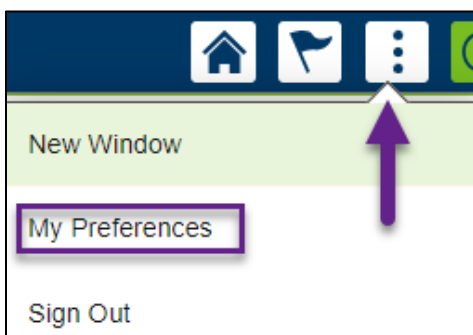
- **Pages:** You can update the tabbing on pages.
- **Distribution Lines:** You can personalize default columns that appear on Distribution Lines in SWIFT modules that require input on Distribution Lines.

IMPORTANT! Once you personalize the tabbing on a page or the appearance of columns on Distribution lines, these personalizations will appear for all transactions from that module page.

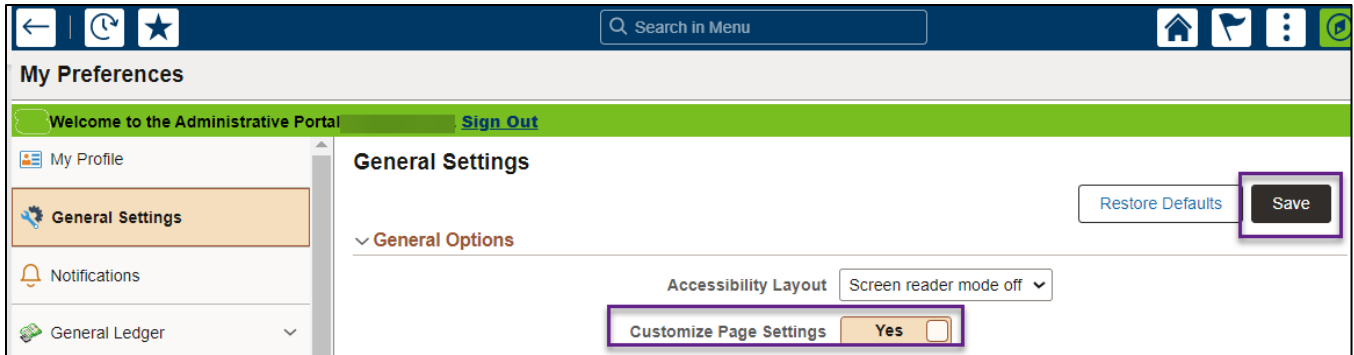
This quick reference guide provides guidance on how to personalize the tabbing on pages and how to personalize the appearance of ChartField columns on Distribution Lines.

Personalize the Tabbing on a Page

1. Before you can personalize pages, you need to turn on the Customize Page Settings option within General Settings.
 - a. Open the **Actions** on the global menu from the Administrative Portal. Select My Preferences.



- b. SWIFT opens the My Preferences page. In the General Settings section, select the **Customize Page Settings** option to activate it. Its setting will switch from “No” to “Yes.”
- c. To save this setting, select the **Save** button.

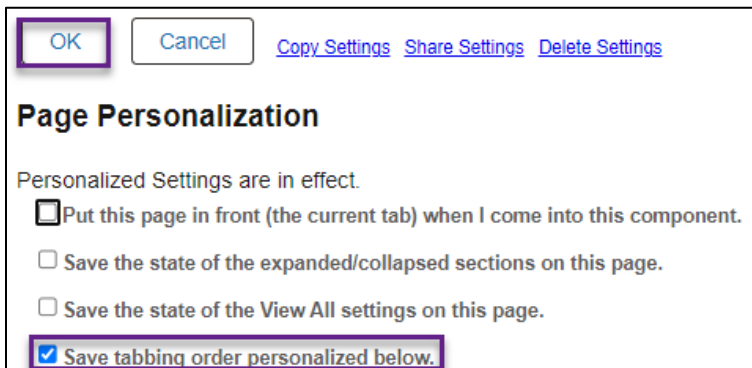


- d. You can now personalize the tabbing pages on SWIFT. To personalize a page, navigate to it. Press the **Personalize Page** link toward the top-right.



SWIFT displays the Page Personalization page. Use this page to change the tabbing order on the page by pressing the radio buttons and numbered items.

2. Check mark the **Save tabbing order personalized below** box.



3. Update the tabbing order as desired using the options described in this guide.
4. When you are done, select **OK**.

Rearrange the tabbing order

To rearrange the tabbing order on a page, select one of the following radio buttons, and then select the numbered items below.

- **Remove From Order:** Press this radio button, and then select the numbered items below to remove them from the tabbing order. SWIFT indicates removed items with an “X.”

Rearrange tab order action

Include In Tabbing Order
 Remove From Order
 Move Up In Order
 Move Down In Order

Service Period Begin Date

- **Move Up In Order:** Press this radio button, and then select the numbered items below to move them up in the tabbing order. The number will change to an earlier sequence term.

Rearrange tab order action

Include In Tabbing Order
 Remove From Order
 Move Up In Order
 Move Down In Order

Invoice No

Invoice Date

Invoice Received

- **Move Down In Order:** Press this radio button, and then select the numbered items below to move them down in the tabbing order. The number will change to a later sequence term.

Rearrange tab order action

Include In Tabbing Order
 Remove From Order
 Move Up In Order
 Move Down In Order

Invoice No

Create a new order

To define a new order, press the **Clear Tabbing Order** button at the top of the page. Then select the numbered items below to create a new tabbing order. The item will change from an “X” to a sequence term.

Save tabbing order personalized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence. This new Tab order setting may be overridden by the people code command SetCursorpos(). To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

Note: Do not use the Include in Tabbing Order radio button. The Include in Tabbing Order radio button will be selected automatically after pressing the Clear Tabbing Order button.

Restore Defaults

Press the **Restore Default** button at the top of the page to restore the prior default settings for the tabbing order.

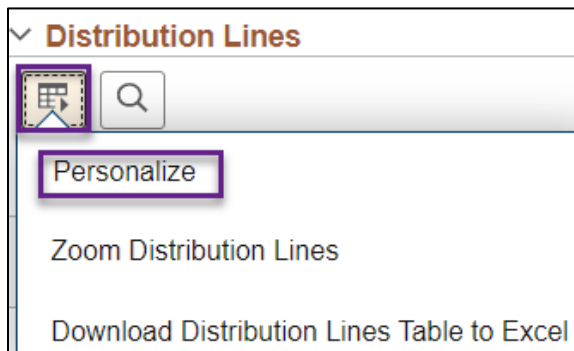
You have successfully personalized the tabbing on a page.

Personalize Distribution Lines

You can personalize default columns that appear on Distribution Lines in SWIFT modules that require input on Distribution Lines. Look for a Grid Action Menu icon above the Distribution Lines section.

Grid Action menu

Navigate to the desired page, press the **Grid Action Menu** icon above the lines, and select the “Personalize” option.

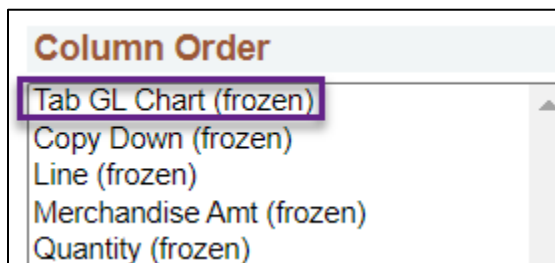


SWIFT opens the Grid Customization page. There are different items you can move up or down in the Column Order section.

Grid Customization page

Tabs vs. Columns

- **Tabs:** Under the Column Order section, tabs are indicated by the word “Tab.” Columns associated with that tab are listed below it. In this example, the Tab GL Chart includes the Copy Down, Line, and Merchandize Amount columns, which are frozen.



If you choose to move all columns from beneath one tab to another tab, that tab will disappear after pressing the **OK** button.

- **Columns:** Columns represent data fields that appear in the line. All other options in the Column Order section without the word “Tab” are columns.

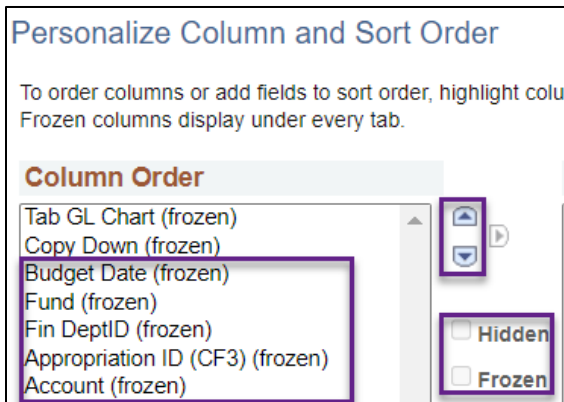
Personalize the Column Order and Sort Order page

NOTE: The Sort Order section is not used.

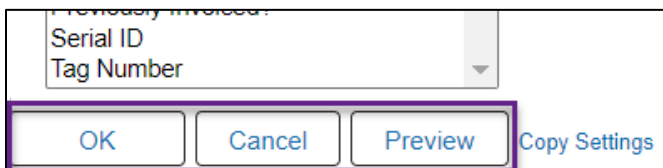
Under the Column Order section, select the following icons, boxes, and buttons to personalize the lines.

1. Select a column to move up or down in the **Column Order** section. Press the **Move Up** or **Move Down** icon to move it in ascending or descending order on the line.
2. Check mark the “Hidden” box to ‘hide’ a tab or a column, which means it will not appear on the line.
3. Check mark the “Frozen” box to ‘freeze’ a tab or a column, which means it will appear on every one of the line’s tabs.

In this example, Budget Date, Fund, Fin DeptID, Appropriation ID and Account are moved up and frozen.



4. There are buttons at the bottom of the page to help you with your personalizations.
 - a. When you are done, select the **Preview** button to see the personalizations.
 - b. If you do not like the personalizations, you can select the **Cancel** button.
 - c. The Copy Setting link is not used.
 - d. Make sure to select the **OK** button at the bottom of the page to save the personalizations.



This customization will appear for all transactions from this page.

Distribution Lines							
GL Chart Statistics Assets ▶▶							
		Copy Down ↑	Budget Date ↑	Fund ↑	Fin DeptID	Appropriation ID (CF3)	Account
+..	-	<input type="checkbox"/>	01/03/2024	5600 <input type="text"/>	G1036206 <input type="text"/>	G100056 <input type="text"/>	430018

Show all columns/Show tabs icons

After personalizing a line, you can view the Distribution Line so that it displays all columns without tabs. To view all columns without tabs, select the **Show all columns** icon to the right of the tabs on a line.

Distribution Lines						
GL Chart Exchange Rate Statistics Assets ▶▶						
		Copy Down	Fund	PO Percent	Show all columns	Fin DeptID
+..	-	<input type="checkbox"/>	1000 <input type="text"/>		<input type="text"/>	G1034000 <input type="text"/>

To view the columns organized in tabs again, click the **Show tabs** icon.

Distribution Lines			
GL Chart Exchange Rate Statistics Assets ▶▶			
		Copy Down	Fund
+..	-	<input type="checkbox"/>	1000 <input type="text"/>