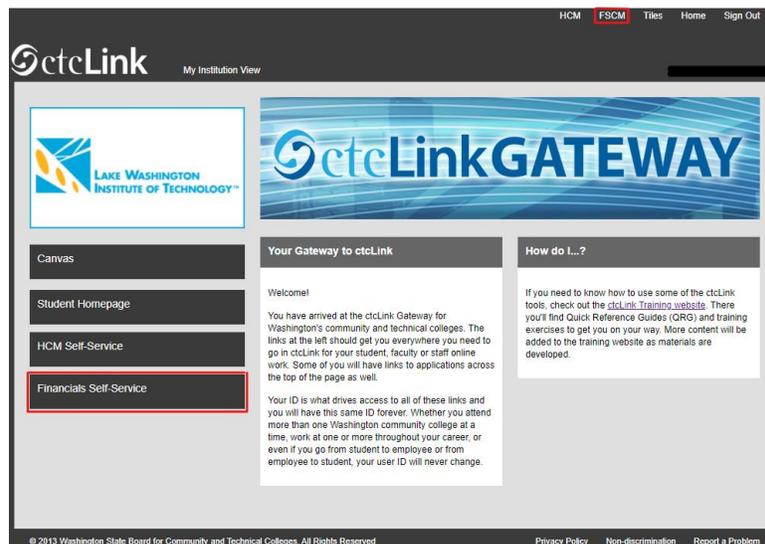




Chartstring Customization

Intended Audience: Requisition Creators

To access Finance documentation, you will need to be in LionLink’s Finance Pillar. Select the “**FSCM**” hyperlink on the top right-hand side of your screen or the “**Financials Self-Service**” tile on the left-hand side of your screen.



Navigation Path: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

1. The **Requisitions Search Page** displays.
2. Confirm that the “**Add a New Value**” tab is selected.
3. Enter the LWTech **Business Unit (WA260)** into the “**Business Unit**” field.
4. Confirm that “**NEXT**” is entered in the **Requisition ID** field.
 - a. Do not put in your own requisition ID. Leave it as “**NEXT**”.
5. Select the “**Add**” button.

Requisitions

Find an Existing Value | Keyword Search | **Add a New Value**

Business Unit

Requisition ID

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

6. The “Maintain Requisition” Page displays.

Maintain Requisitions
Requisition

Business Unit WA260 Status Open
 Requisition ID NEXT Budget Status Not Chkd
 Requisition Name [] Copy From Hold From Further Processing

▼ Header

*Requester []
 *Requisition Date 03/21/2022 Requisition Info
 Origin ONL On Line Entry
 *Currency Code USD Dollar
 Accounting Date 03/21/2022

Amount Summary
 Total Amount 0.00 USD

Requisition Defaults Add Comments
 Requisition Activities Add Request Document

Add Items From
 Purchasing Kit Catalog
 Item Search Requirer Items

7. In order to customize your chartstring, you will have to input an item.
 a. This can be any item, as you will not be completing the purchase.

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	005-05	Abrasive Equipment	0.0000	EA	005	0	0.00	Open

8. Once you have selected an item, click the “Schedule” button on the far right.

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	005-05	Abrasive Equipment	0.0000	EA	005	0	0.00	Open

9. The Maintain Requisitions page displays. Select the “Distributions” icon.

Line

Line	Item	Description	Quantity	Merchandise Amt
1	005-05	Abrasive Equipment and Tools	0.0000	0.00 USD

Schedule

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	LWSHIPR	0.0000	0.00000	0.00		Colby Meehan	Active

10. The Distribution page displays. Click on the “Grid Action Menu” button and select “Personalize” from the drop-down menu.

Maintain Requisitions

Distribution

Requisition ID NEXT Item 005-05 Abrasive Equipment and Tools
 Line 1 Status Active
 Schedule 1
 Ship To LWSHIPREC SHIP/REC Quantity 0.0000 EA
 *Distribute By Quantity Open Quantity 0.0000
 *Liquidate By Amount Merchandise Amt 0.00 USD
 SpeedChart Multi-SpeedCharts

Distributions

Personalize
 Zoom Distributions
 Download Distributions Table to Excel

Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund
	0.0000	0.00	WA260			

OK Cancel Refresh

11. The **Grid Customization** window will display.

- a. You can customize the order in which your chart fields appear by clicking on the desired field, like “Class,” for instance, and then using the arrows to move the field up or down.
 - i. Moving a chart field up will cause that chart field to appear earlier in the sequence.
- b. You can also hide unwanted fields by clicking on the unwanted field and click the “**Hidden**” check-box. The will then have “(Hidden)” next to them.

Note: Our recommended chart field sequence is displayed below:

Grid Customization

Tab Chartfields (frozen)
 Distrib (frozen)
 Status (frozen)
 Percent (frozen)
 Quantity
 Merchandise Amount
 GL Unit
 Account
 Oper Unit
 Fund
 Dept
 Class
 State Purpose
 Approp
 PC Bus Unit
 Project
 Activity
 Program (hidden)
 Source Type (hidden)
 Subsidiary (hidden)
 Affiliate (hidden)
 Fund Affiliate (hidden)
 Oper Unit Affil (hidden)
 Tab Details
 *Location
 IN Unit
 Statistics Code
 Open Quantity
 GL Base Amount
 Base Currency
 Exchange Rate Detail
 Tab Asset Information
 AM Unit
 Profile ID
 CAP #
 Sequence
 Tag Number
 Empl ID
 Capitalize
 Cost Type
 Description
 Tab Budget Information
 Budget Status
 Budget Date
 Merchandise Amount
 Pre-Encumbrance Balance
 Currency
 Pre-Encumbered Base Balance

Hidden
 Frozen
 Descending

12. You can now select the “**OK**” button at the bottom of the **Grid Customization** window.
 - a. The window will close

13. Process complete.
 - a. You can now exit the requisition without saving it, and your chartstring customization settings will be saved.