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.
6. The “Maintain Requisition” Page displays.

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.

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


10. The Distribution page displays. Click on the “Grid Action Menu” button and select “Personalize” from the drop-down menu.
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:
12. You can now select the “OK” button at the bottom of the Grid Customization window.
   a. The window will close

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