Requisition Chart Field Fix Instructions – Copy Settings

The purpose of this fix is to bring together relevant chart fields on one tab in the Accounting Lines section in the Checkout area of an eProcurement requisition.

1. Once you have added at least one item to a requisition, navigate to the Checkout page by clicking the Checkout Button:

2. To access the Accounting Lines, you will need to expand the Requisition Line item twice by clicking the expand arrows identified below:

The Accounting Lines shown in the above screenshot have already been modified. If your Accounting Lines look like the above, you do not need to copy the settings. However, if you do not see the Project and Oper Unit fields as shown, please click the Personalize link circled above in green.
3. The Accounting Lines – Personalize Column Order pagelet will open as shown below:

You will need to scroll to the bottom of the accounting lines personalization column order page.

Click the Copy Settings link at the bottom of the page as shown here:

The Copy Settings pagelet will open.

Click the magnifying glass shown above.
You may need to click the Look Up button. When you find the REQUISITION_CHARTFIELDS Setting, click on it.

You will be returned to the Copy Settings pagelet – click OK.

At the bottom of the Accounting Lines – Personalize Column Order pagelet, click OK.

You will be returned to the Checkout page of the requisition.

Verify that your Accounting Lines look similar to the below screenshot.

If you have any questions, please contact the Purchasing Office (509-963-1001) or email purchasing_office@cwu.edu or email Lucinda Lunstrum (lunstrum@cwu.edu).