



CU Marketplace Tip: How do I enter a ChartString in my Requisition?

What is it?

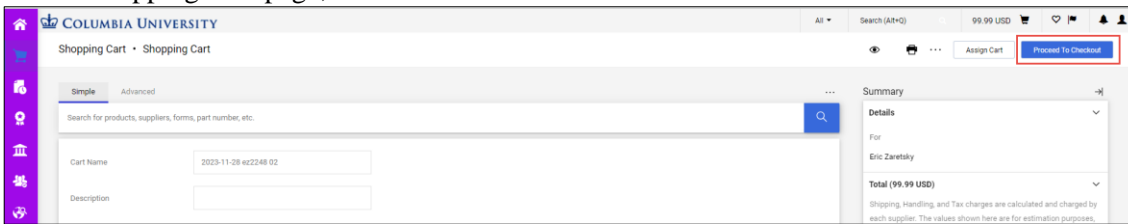
When on the checkout screen for your CU Marketplace Cart, Requesters must ensure the Accounting Code (ChartString) information is complete and correct before submitting as a Requisition into approval workflow. Shoppers have the option to enter this information but are not required to do so.

If ChartString information is not complete, you must enter it before checking out. If you created default values in your Profile (refer to the [Modifying Profile Settings in the CU Marketplace job aid](#)), those values will be populated with that information.

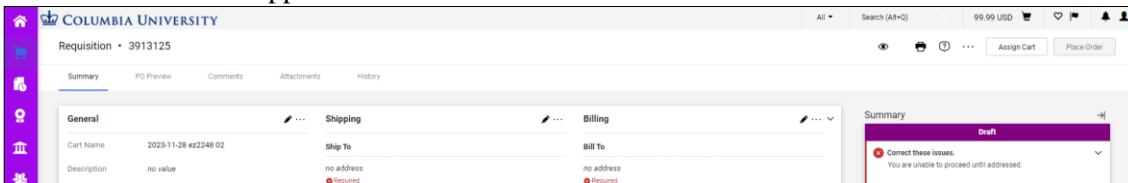
Viewing a Requisition to Update Accounting Codes (ChartString)

In order to update the ChartString (Accounting Codes), you must proceed to Checkout in order to view the Requisition screen.

On the Shopping Cart page, click the **Proceed to Checkout** button.



The Checkout screen appears.



Updating Accounting Codes (ChartString) at Checkout

1. On the Checkout screen, click the **Edit**  icon for Accounting Codes.

Accounting Codes								
GL Business Unit	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit	AM Business Unit
COLLUM Columbia University	PC001490 FFS IMMUNOGENETICS	01-FFS IMMUNOGENETICS	7538803 PAT Immunogenetics	00000 Undefined Initiative	00000000 Undefined Segment	1001 AVERY	GENRL GENRL	COLUM Columbia University


The Edit window will appear. It will display the default or populated ChartFields,

Edit Accounting Codes

GL Business Unit *	Project *	Activity *	Department *	Initiative *	Segment *	Site	PC Business Unit
COLLUM - Columbia University	UR008835	01-ZUC ZUCKE...	6801101	00000	00000000	Search	GENRL

★ Required fields

Save **Close**

2. Update the ChartFields as needed. ChartFields must be entered in order left to right as the available values are dependent on the value in the previous field. Click the **Dropdown**  arrow in the field you are populating to view the available values and select the matching value.

Accounting Codes

GL Business Unit * Project * Activity * Department * Initiative *

COLUM - Columbia University UR008835 01-ZUC ZUCKE... 00000

Organization Values

- 6801101 - ZUC General
- 6802102 - ZUC Administrative Operations
- 6803101 - ZUC Scientific Programming
- 6803202 - ZUC Finance

★ Required fields

3. Click the **Validate** ✓ icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required 1403102 Required, click the Validate icon again.

+ You can click the **Add Split** icon to add an additional ChartString line and indicate a percent distribution. Please note Jaggaer will enhance the functionality to allow a dollar amount split in a future release.

♥ You can click the **Code Favorites** icon to select a favorite ChartString you created in your Profile.

4. Click the **Save** button.

Each item in your Cart can also be updated with different ChartStrings. Click the **Line Item Actions** icon for the item and select **Accounting Codes**.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	Required: GL business Unit
1 Moleskine Classic Hard Cover Notebook, 5" x 8.25", Sapphire Blue (893601)	2071318	EA	16.87	1 EA	16.87	Required: Project Required: Activity
<p>ITEM DETAILS</p> <p>Manufacturer Name: HACHETTE BOOK GROUP Contract: no value Capital Expense? No</p> <p>Manufacturer Part Number: 893601 Category Code: Z1000000 / Miscellaneous- Business Services</p> <p>Supplier Part Auxiliary ID: 2071318 Account: 61405 SUPPLIES AND MATERIALS-GENERAL</p> <p>more info...</p>						
2 Sharpie Rollerball Pen, Needle Point Precision Pen, Black Ink,	SAN2093225	DZ	27.39	1 DZ	27.39	

Where do I get help?

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>