

PeopleSoft Financials – Look Up Chartfields by Description

Used for: Searching for proper Account number to use by (use 00797)

- Description, or
- Partial account number

7.6 Reference: *Define Chartfields*
Web Look-up for account

Searching for any cost center chartfield by (use 00765)

- Description, or
- Partial number

Access the Financial Production database: <https://my.uh.edu/fs>

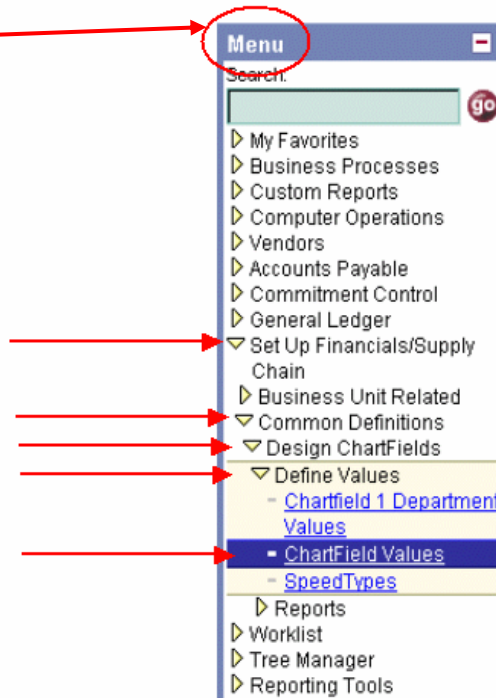
Or, See the [SignOn Financial Production](#) job aid.

Remember to use
ALL CAPS

NAVIGATION / PATH

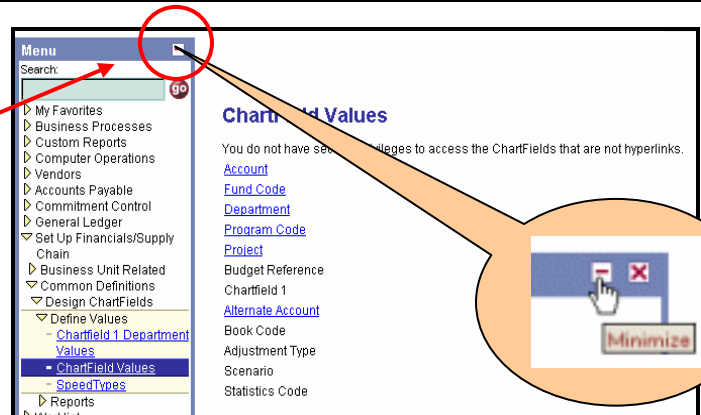
Under **Menu** click on:

- ▶ **Set up Financials/Supply Chain**
- ▶ **Common Definitions**
- ▶ **Design ChartFields**
- ▶ **Define Values**
- ▶ **ChartField Values**



Option:

In order to have more viewing of the panels, minimize the Menu by clicking on the red minus sign.



It will then appear as an *Expand* button if needed again.



INSTRUCTIONS

Be sure to add to "Favorites"!

STEP 1: In the ChartField Values Panel:

➤ Click on desired selection; for this exercise, use **Account**

ChartField Values

You do not have security privileges to access the ChartFields that are not hyperlinks.

[Account](#)
[Fund Code](#)
[Department](#)
[Program Code](#)
[Project](#)
 Budget Reference
 Chartfield 1
[Alternate Account](#)
 Book Code
 Adjustment Type
 Scenario
 Statistics Code

STEP 2: Enter data In the Account panel:

➤ **SetID:** 00797 (Default—Correct for acct.);

Can click on to choose another option if necessary.

Account

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: [=] 00797

Account: [begins with]

Description: [begins with]

Account Type: [begins with]

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

➤ Enter **Account** number, either complete or partial.

OR

Enter a **Description** (either a word or phrase—do not use “%” here.)

➤ Click .

Account

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: [=] 00797

Account: [begins with] 539

Description: [begins with]

Account Type: [begins with]

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

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STEP 3: In the Search Results:

At the bottom a listing is given for the Account Number (or description) that matches the given criteria.

➤ Click anywhere on the link to display the panels.

Account
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID: = 00797
 Account: begins with 539
 Description: begins with
 Account Type: begins with

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results
View All First 1-21 of 21 Last

SetID	Account	Description	Account Type	Control Flag	Book Code	Balance Sheet Indicator
00797	53900	OFFICE SUPPLIES	E	N	(blank)	(blank)
00797	53901	BOTTLE WATER	E	N	(blank)	(blank)
00797	53901	BOTTLE WATER/COFFEE SERVICE	E	N	(blank)	(blank)
00797	53902	RESEARCH AND TEACHING SUPPLIES	E	N	(blank)	(blank)
00797	53903	OFFICE SUPPLIES - REALLOCATION	E	N	(blank)	(blank)

STEP 4: To get to the Long Description:

➤ Click on Description tab

Account VAT Options **Description** Map to Alternate Account

SetID: 00797 Account: 53900

Effective Date Find | View All First 1 of 1 Last

Effective Date: 08/31/1998 Status: Active Attributes
 Description: OFFICE SUPPLIES Control Account
 Short Description: OFFICE SUP Budgetary Only
 Statistical Account Unit of Measure:
 Monetary Account Type: Expense Book Code:
 VAT Account Flag: Non-VAT Related Balance Sheet Indicator:
 OpenItem Account Description of OpenItem:
 Edit Record:

➤ Long Description is displayed.

Account VAT Options **Description** Map to Alternate Account

SetID: 00797 Account: 53900

Effective Date Find | View All First 1 of 1 Last

Effective Date: 08/31/1998 Title: OFFICE SUPPLIES

Description: GOODS PURCHASED FOR ADMINISTRATIVE USE TO BE CONSUMED WITHIN THE YEAR EXCEPT TELECOMMUNICATIONS SUPPLIES (FAX PAPER), SHOP SUPPLIES, AND BOTTLED WATER.

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If this is not the correct account number, you may click **Next in List** to scroll through the **Search Results** (that appeared in Step 3).

Or, click **Return to Search** to look for another account number.

The screenshot shows the 'Description' tab of an account lookup. At the top, there are tabs for 'Account', 'VAT Options', 'Description', and 'Map to Alternate Account'. Below the tabs, the 'SetID' is 00797 and the 'Account' is 53900. The 'Effective Date' is 08/31/1998 and the 'Title' is 'OFFICE SUPPLIES'. A large text area contains the description: 'GOODS PURCHASED FOR ADMINISTRATIVE USE TO BE CONSUMED WITHIN THE YEAR EXCEPT TELECOMMUNICATIONS SUPPLIES (FAX PAPER), SHOP SUPPLIES, AND BOTTLED WATER.' At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', and 'Notify'.

To search for another *chartfield*, click [Chartfield Values](#) in the menu

The screenshot shows the 'Menu' window with a search bar and a list of categories. The 'Design ChartFields' category is expanded, and 'ChartField Values' is highlighted. Other categories include 'My Favorites', 'Business Processes', 'Custom Reports', 'Computer Operations', 'Vendors', 'Accounts Payable', 'Asset Management', 'Commitment Control', 'General Ledger', 'Set Up Financials/Supply Chain', 'Business Unit Related', 'Common Definitions', 'Reports', 'User Preferences', 'Worklist', 'Tree Manager', 'Reporting Tools', and 'PeopleTools'.

ChartField Values

You do not have security privileges to access

- [Account](#)
- [Fund Code](#)
- [Department](#)
- [Program Code](#)
- [Project](#)
- Budget Reference
- Chartfield 1
- [Alternate Account](#)
- Book Code
- Adjustment Type
- Scenario
- Statistics Code

No lookup currently exists to find **SpeedType** by description. Will need to l/u program by descr, then use [Business Processes](#) (instructions in *Lookup Cost Centers by Chartfield*)

OR

Use the query:
UHV_COST_CENTER_BY_DEPT
 (To get a listing of all the cost centers & their speedtypes by department.)

Look up **criteria** for each Chartfield:

CF:	SetID:	Parameters:
Account	00797	Account Number Descr Account Type
Fund	00765	Fund Code
Dept	00765	Dept Number Manager Name
Program	00765	Program Code Descr
Project	00765	Project Number