

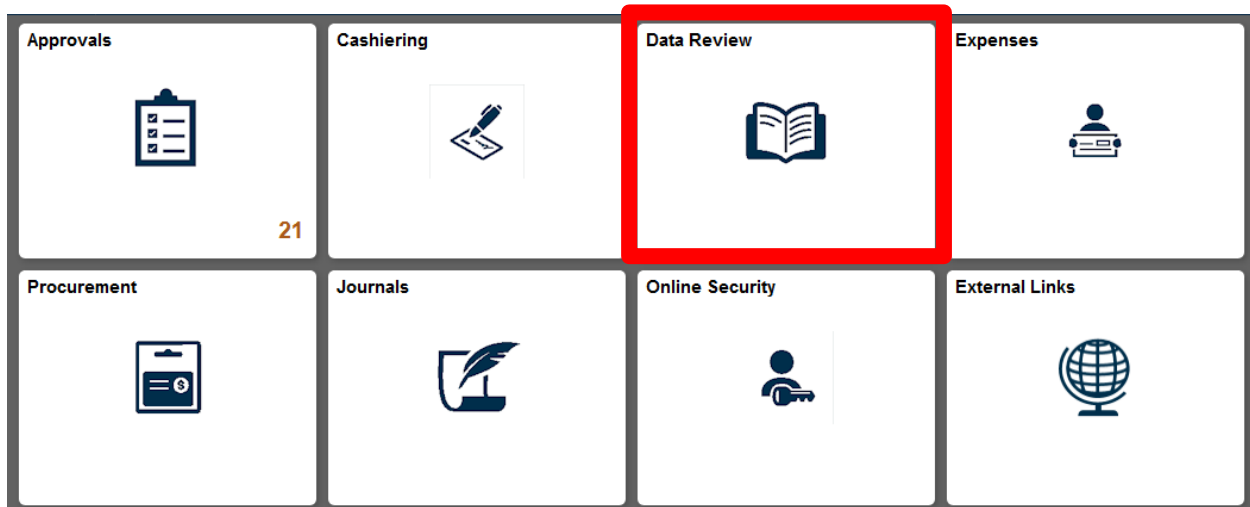
PeopleSoft - Creating an Event ChartField

Concept:

This business process explains how to create an Event ChartField.

Procedure:

The Event ChartField can be created to represent a particular program, event, or conference to track expenditures and/or revenues. This is an optional ChartField.



1. Select the **Data Review** tile.



2. Select the Review **Chartfield Data** tile

ChartField Values

ChartField Values

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

Account
Alternate Account
Operating Unit
Fund Code
Department
Program Code
Class Field
Budget Reference
Product
Project
Event
Book Code
Adjustment Type
Scenario
Statistics Code

3. Click the **Event** Link.

Event

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

SetID: 

Event: 

[Add](#)

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

4. The ChartField screen appears. Click the **Add a New Value** tab

- Enter the name of the event in the **Event** field. It can be up to 10 alphanumeric characters. For example, enter the name “train5”
- Click the **Add** button.

The screenshot shows the 'Event' entry screen in PeopleSoft. At the top, it displays 'SetID CASE1' and 'Event TRAIN5'. Below this is a table with the following columns: Effective Date, Status, Description, Short Description, Budgetary Only, Attributes, and Long Description. The first row of data shows '03/03/2015' in the Effective Date column, 'Active' in the Status column, and empty fields for the other columns. To the right of the table, there are navigation controls including 'Personalize', 'Find', 'View All', and 'First 1 of 1 Last'. Below the table, there are several buttons: 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

- Verify or update the Effective Date. A best practice is to update the date with the beginning of the current month.
- The event screen appears. Enter the name of the Event in the **Description** field, up to 30 characters (Ex: “**Tracking of Conf attendees**”). Please note: Be as specific as possible when naming an event. This will be helpful to you later when finding your event.
- Enter the Short Description, which is up to 10 alphanumeric characters (Ex: **Conf 1**).
- Click the **Save** button.
- If the effective date for the event is the current date or earlier, it will be active immediately in PeopleSoft.

End of Procedure.