

# PS Financials 9.2

## Manage Favorite List of Accounting Tags (Speedcharts)

PeopleSoft refers to Speedcharts as “Accounting Tags” on Requisitions

Click on Schedule Details button on Checkout page

**Create Requisition**

Continue Shopping Save Submit

Checkout Order Total 20.99 USD

▼ Requisition Summary

Business Unit PUGET The University of Puget Sound Priority Medium

Requisition Name TREE ZERO PAPER

Requester rleathers Rachel Leathers

Currency USD

Header Comments

▼ Justification Comments

▼ Requisition Lines Overview

Select All Actions

Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request TreeZero TreeFree Multipurpose Paper 8.5" x 11", 20 lbs, White, 1500 Sheets/Carton	1.0000	CT Q	20.99	USD	20.99 USD	<input type="checkbox"/> <input type="button" value="ScheduleDetails"/>

Order Total 20.99 USD

Requisition Line Details

Order Total 20.99 USD

1 row

Line 1  
TreeZero TreeFree Multipurpose Paper, 8.5" x 11", 20 lbs, White, 1500 Sheets/Carton  
Special Request

Line 1

Schedule Details | Line Details

Item Summary

TreeZero TreeFree Multipurpose Paper, 8.5" x 11", 20 lbs, White, 1500 Sheets/Carton

Item ID  
Item Category OFFICE Supp, GENERAL  
Supplier STAPLES CONTRACT & COMMERCIAL, INC  
Supplier Item ID 24443014  
Buyer  
Price 20.99 USD  
Quantity 1 Carton

Manufacturer  
Manufacturer's Item ID

Special Request

Schedule 1

Schedule 1

\*Ship To PS00001930  Quantity 1.0000  
Attention To Rachel Leathers Price 20.99 USD  
Due Date  Total 20.99 USD  
Address 901 North Union Avenue One Time Address  
Tacoma, WA 98406



Distributions

\*Distribute By Quantity Accounting Tag

Chartfields1	Chartfields2	Chartfields3	Details	Budget Information	Asset Information	Show All		
Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		PS00001930 <input type="text"/>	1.0000 <input type="text"/>	1.0000	100.0000 <input type="text"/>	20.99	PUGET <input type="text"/>

Click on Accounting Tag hyperlink

The screenshot shows the 'Requisition Line Details' window for 'Line 1'. The window title is 'Requisition Line Details' and the order total is '20.99 USD'. The line item is 'TreeZero TreeFree Multipurpose Paper, 8.5" x 11", 20 lbs, White, 1500 Sheets/Carton'. The 'Schedule 1' section shows a quantity of 1.0000, a price of 20.99 USD, and a total of 20.99 USD. The 'Distributions' section shows a quantity of 1.0000 and a merchandise amount of 20.99. The 'Accounting Tag' hyperlink is circled in red, and a blue arrow points to it.

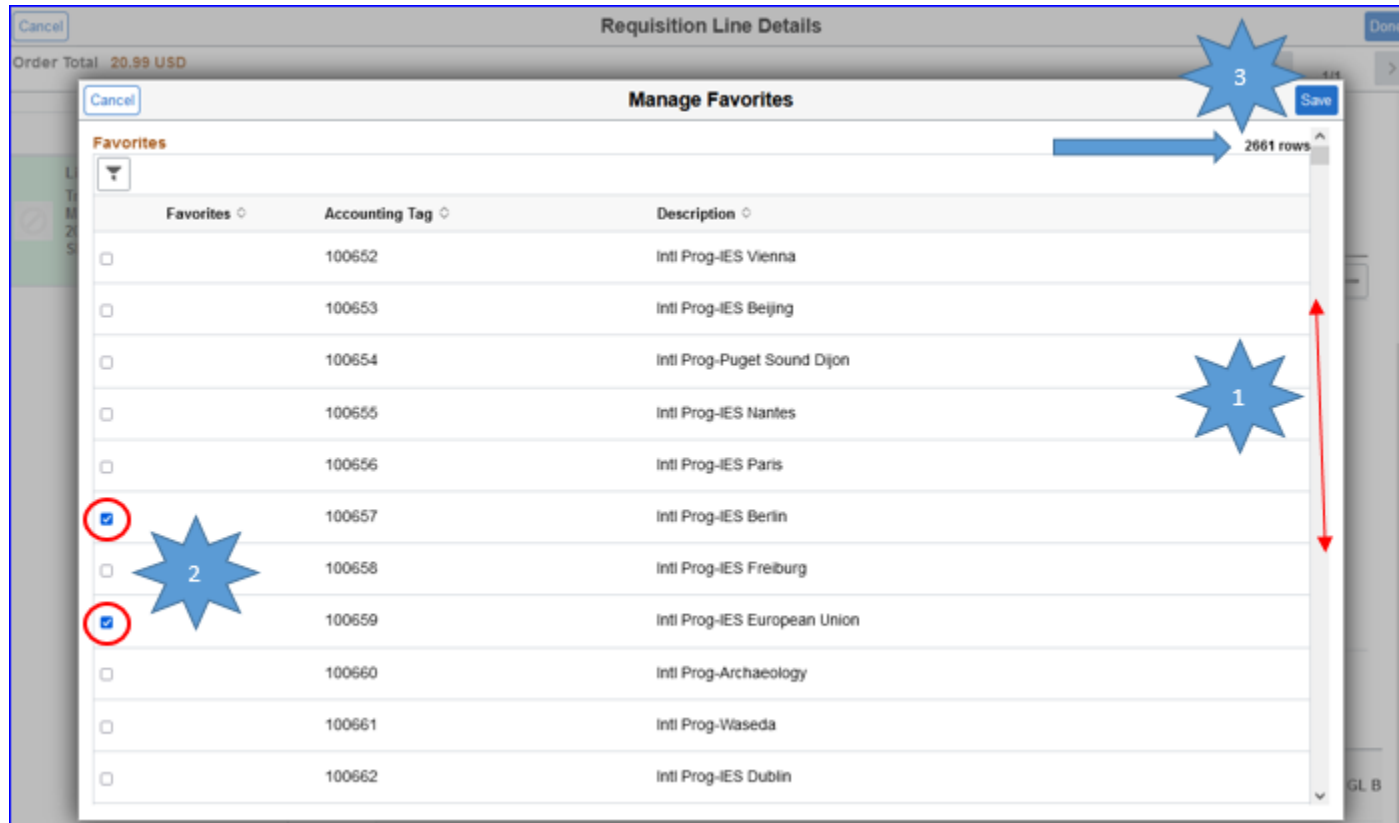
Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		PS00001930	1.0000	1.0000	100.0000	20.99	PUGET

Click Manage Favorites hyperlink to maintain your own list of Favorite Speedcharts

The screenshot shows the 'Accounting Tag' dialog box. The dialog title is 'Accounting Tag'. It displays the following information: Total Quantity 1.0000, Remaining Quantity 1.0000, and Undistributed Quantity 0.00. The 'Manage Favorites' hyperlink is circled in red, and a blue arrow points to it. Below the dialog, the 'Accounting Tag List' section shows 'No Data Exists' and an 'Add' button.

You have two options to produce a Favorites list...

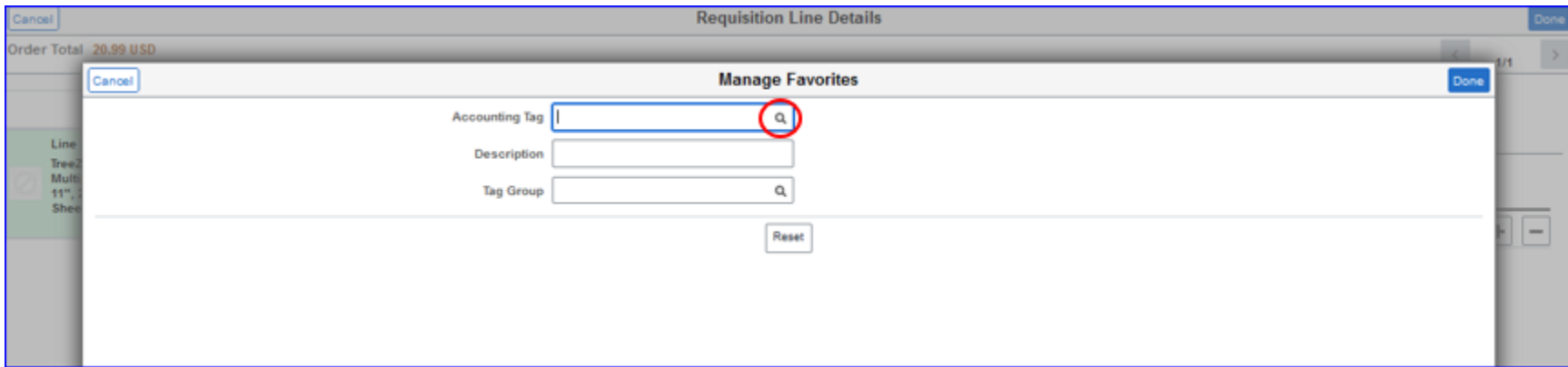
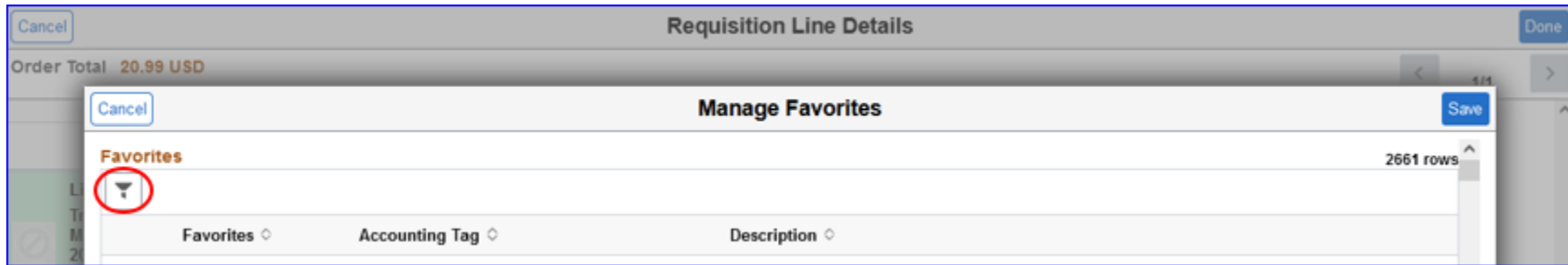
### OPTION 1: Select from entire list



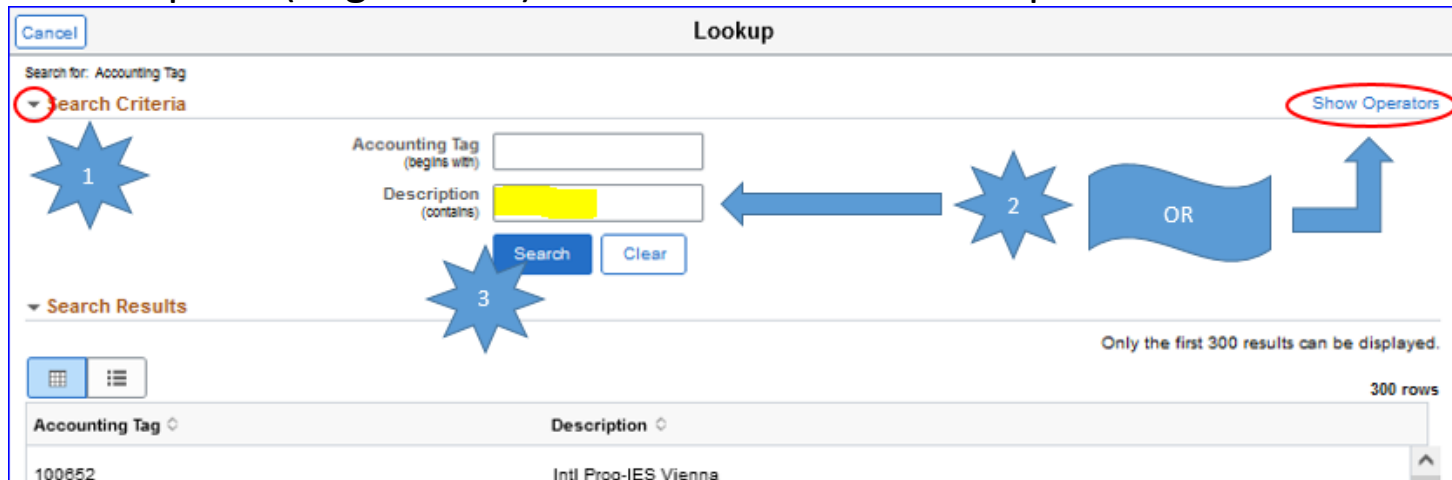
1. Use the right scroll bar to look through the entire list of available speedcharts
2. Click the checkboxes on the left to mark the speedcharts you regularly use
3. Click the Save button at top right to save your Favorites in a list.

OR follow snips for...

## OPTION 2: Use filter to find desired selections



Enter Description (begins with) if known...or use Show Operators to use “contains”



Cancel **Lookup**

Search for: Accounting Tag Hide Operators

▼ Search Criteria

Accounting Tag begins with

Description contains

**Search** Clear

▼ Search Results

Only the first 300 results can be displayed.

Click either code or description of desired Speedchart to continue

Cancel **Lookup**

Search for: Accounting Tag

▶ Search Criteria

▼ Search Results

5 rows

Accounting Tag	Description
104011	Biology
180012	Biology UEC Stud Res Awards
184130	Dept Travel-Biology
184180	Genl Gifts-Biology Dept
220586	Thomas W Smith Biology Fund

**Manage Favorites**

Accounting Tag: 104011

Description:

Tag Group:

Reset

Cancel Done

Make sure to click checkbox at left to Select before clicking Save at top right...

**Manage Favorites**

Save

Favorites 1 row

Favorites	Accounting Tag	Description
<input checked="" type="checkbox"/>	104011	Biology

From here, you can either:

- (1) Continue adding Favorites OR
- (2) Add selected Speedchart to your requisition (to build your Favorite list one-at-a-time)

**Requisition Line Details**

20.99 USD

**Accounting Tag**

Total Quantity 1.0000  
 Remaining Quantity 1.0000  
 Undistributed Quantity 0.00

Manage Favorites 1

**Accounting Tag List**

No Data Exists

Add 2

OR

Please remember that whenever Speedchart is replaced on the requisition line, expenditure account (and Chartfield1) need to be re-entered as described in the Submitting Requisition in 9.2 Financials link on the Finance [Procurement Resources & Training Materials | University of Puget Sound](#) web page.

**Congratulations! You have created a shortcut list of Favorite Accounting Tag / Speedcharts for requisitions!**

To access it, make sure to select Favorites in the List field before searching the Accounting Tag field

The screenshot shows a search interface titled "Accounting Tag". At the top left is a "Cancel" button and at the top right is a "Done" button. Below the title bar, there are four input fields: "List" (a dropdown menu showing "Favorites" in yellow), "Accounting Tag" (a text box with a magnifying glass icon circled in red), "Description" (a text box), and "Tag Group" (a text box with a magnifying glass icon). A blue arrow points to the "List" dropdown. Two blue starburst icons are present: one labeled "1" next to the "List" dropdown and one labeled "2" next to the "Accounting Tag" search icon. A "Reset" button is located at the bottom center of the form.



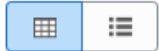
Cancel

## Lookup

Search for: Accounting Tag

▶ **Search Criteria**

▼ **Search Results**



1 row

Accounting Tag ◇	Description ◇
104011	Biology