An initiative is a five-digit PeopleSoft chartfield that allows you to do additional tracking of your expenses by categorizing them. The initiative value will show on your nVision report and allows you to sort/group transactions.

If you would like an initiative set up, please contact the PeopleSoft team at psteam@towson.edu.

Once the PeopleSoft Team has confirmed your initiative is ready to use, applying it to expenses is easy. For an expense journal entry (interdepartmental transfer) you will use the Spreadsheet Journal Upload to apply the initiative. In order to apply it, you will **credit** the Department/Account # on the first line and then **debit** the Department/Account # **and** the initiative code on the second line as seen below.

Once the journal has been submitted and posted, you will see the initiative classifications on your DAT reports.

For information on working with initiatives and budget journals, please see the Budget Department’s guide to [Working with Initiatives in PeopleSoft Financials](#).

For information on using initiatives and vendor invoicing, please see the code block section on the [Accounts Payable Vendor Invoicing page](#).