

[Using SpeedCharts for ChartField Combinations]

SpeedCharts greatly increase data entry efficiency by reducing the number of keystrokes required to enter frequently used ChartField combinations. SpeedChart are used by entering the SpeedChart code during data entry instead of the individual ChartField combinations.

This guide explains how to set up SpeedCharts that can be used to complete your department's required ChartField combinations in just two clicks.

NOTE: To complete this process, you must have at least one of these security roles:

UF_PO_DEPARTMENT_APPROV

UF_PO_INITIATOR

UF_PO_PCARD_RECONCILER

ERUF_AP_VCHR_PROCESSOR

UF_AP_VCHR_MANAGER

UF_CR_AR_CASHIER

- ▶ Log on to myUFL (my.ufl.edu) using your GatorLink username and password
- ▶ Navigate to: Setup Financials/Supply Chain → Product Related → Procurement Options → Management → SpeedChart
 - ▶ If the "SpeedChart" link is unavailable, you do not have an appropriate security role
 - ▶ At the SpeedChart screen, click the "Add a New Value" tab
- ▶ At the **Add a New Value** tab:
 - ▶ Leave SetID as UFLOR (default)
 - ▶ Complete the **SpeedChart Key** field with a name of your choice. Write it down. When processing in the subsystems (AP, AR, PO, PCard), only you will be able to use the SpeedChart. Each user must set up his or her own SpeedChart(s) in order to use this functionality. The Speedchart Key Field is limited to 10 characters (letters and digits are accepted)
 - ▶ At **User ID**, enter your User ID (also known as UFID, Employee ID, or EmplID)
 - ▶ Leave **Primary Permission List** blank
 - ▶ At **Effective Date** enter July 1, 2004, or grant start date, whichever is latest
 - ▶ When satisfied that the information entered is correct, click the **Add** button
 - ▶ IMPORTANT: "SetID," "SpeedChart," and "Effective Date" CANNOT be changed after "Add" has been clicked
- ▶ At the **SpeedChart** tab:
 - ▶ **Description** field: Enter a more complete description if desired
 - ▶ **Security**: IMPORTANT - Security *should always be set to ONE USER*
 - ▶ Note: If **Security = Universal**, then your ChartField combination will be available for editing in the Speedchart setup link by all UF employees with proper security. Since Speedcharts are attached to UFIDs, if someone changes your Speedchart in setup, you will no longer have access to use it in the subsystems
 - ▶ Next, enter the appropriate ChartField combination. Not all fields are required. Enter as many or as few as needed or appropriate.
 - ▶ **GL Unit**: Default value = UFLOR
 - ▶ **DeptID**: Enter the appropriate Department ID for the ChartField combination. Used to identify your organizational structure
 - ▶ **Fund**: Enter the appropriate Fund Code for the ChartField combination. Answers the question, From where does your department's money come?
 - ▶ **Program**: Enter the appropriate Program Code for the ChartField combination. Answers the question, Why are you doing the action?



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- ▶ **Account:** Leave blank (best practice). Answers the question, "What are you doing?" Rather than include a specified Account in the SpeedChart, a better practice is to enter the correct Account directly when completing the revenue or expense transaction
- ▶ **Source:** If needed, enter the appropriate Source of Funds for the ChartField combination. Answers the question, Who is the outside funding source?
- ▶ **Bud Ref:** = CRRNT Answers the question, When were the funds allocated?
- ▶ **Flex:** If needed, enter the appropriate Flex Code for the ChartField combination. Optional field used by departments, if desired, for their own reporting requirements
- ▶ **ID:** Leave blank
- ▶ **Projects** link: If setting up the SpeedChart *for a grant*, click the "Projects" link
 - ▶ Then, complete "PC Business Unit," "Project," and "Activity ID" as appropriate
- ▶ Review for accuracy. Saved information CANNOT be deleted. It can be set to inactive
- ▶ Click the **Save** button

Using an Established SpeedChart

Most users will find SpeedCharts helpful when vouchering, creating a purchasing requisition, or reconciling a PCard.

The next time a ChartField combination must be entered for a revenue or expense transaction, look for a SpeedChart field typically located above the ChartField distribution line. In some cases, the SpeedChart field will have a magnifying glass icon already available. Simply click on the magnifying glass view icon, then select or enter your established SpeedChart Key to populate the ChartField combination.

In other cases, a checkbox will be provided by the word SpeedChart. Simply click on it to enable the field with the magnifying glass view icon. Enter your SpeedChart Key into the field provided. This will fill the ChartFields with your pre-selected ChartFields.

NOTES

- ▶ You may review the "Required ChartField" information at <http://www.bridges.ufl.edu/ledger/RequiredCFs.xls> for correct ChartField combinations
- ▶ With certain Fund Codes, other ChartFields must also be used to have a proper ChartField combination. Some Funds require Project, PC Business Unit, and Activity ID. Certain Funds require Dept Flex. Still Other Funds Require Source of Funds.
- ▶ When setting up a SpeedChart, SetID must be UFLOR. Do NOT change "SetID"