



## ***SpeedTypes***

### **Overview**

For many users entering transactions, entry of the full set of chartfields may be a problem because of the number of chartfields and the chartstring length. To help with the entry of chartfields in transactional systems such as BearBuy, MyExpense, Connexus, and Online Journals, financial administrators may establish shortcuts called SpeedTypes which are expanded upon entry into the full chartstring (except for Account).

Although the functionality of SpeedTypes mirrors the old functionality of Speedcharts, there is an important distinction in that the SpeedType will not be a purchasing authorization. In addition, departments will be responsible for creating and maintaining SpeedTypes for their department. There will be a nightly process that deactivates SpeedTypes that do not pass the combo edit process.

### **Guidelines for Managing SpeedTypes**

#### **DOs**

1. Do create a naming convention for your department's SpeedTypes, designating the Control Point with the first letter or following any other conventions developed by your Control Point or Department.
2. Do set up SpeedTypes for BearBuy Requesters who are not financial users and might be confused by the chartfields.
3. Do set up SpeedTypes for faculty and staff who complete their own MyExpense reports **and** are unfamiliar with the financial chartstring.
4. Do run the SpeedType inquiry (by Department ID) to see if a SpeedType already exists for a chartstring.
5. Do ensure that your recharge systems accommodate the full Chartstring as well as SpeedTypes.
6. Do set up Effective Dated Rows for each Activity Period when you set up SpeedTypes for sponsored projects with multiple activity periods.

#### **DON'Ts**

1. Do not set up SpeedTypes for chartstrings that are only used in PPS since PPS cannot accommodate SpeedTypes.
2. Do not set up SpeedTypes for one-time only transactions unless it is used for MyCores or Connexus direct bill.
3. Do not set up SpeedTypes for chartstrings that are only used in financial journals, for example, transfer transactions.

## Campus Systems Supporting SpeedTypes

Below is a list of campus systems and whether or not they support SpeedType functionality:

System	SpeedType	Comments
PeopleSoft	Yes	For recharge units whose recharge system generates a flat file for uploading through the Batch Journal Process, SpeedTypes <u>are not available</u> as an option.
BearBuy	Yes	
Connexus (travel portal)	Yes	For billing airline tickets directly to the University, Connexus will require a SpeedType
MyCores	Yes	Requires SpeedType
MyExpense	Yes	
Magical PAF Machine (MPM)	No	MPM may add SpeedTypes at a later date.
PPS	No	

Department systems can access the SpeedType table through the Operational Data Store (ODS) to support SpeedType usage for recharges and other applications.

### SpeedType Definition Process

The SpeedType will be between 6 and 10 characters. When a user enters a new SpeedType, it will be edited to validate that it contains only numbers and letters (no special characters). An error message will be generated if fewer than 6 characters are entered. A recommended SpeedType naming convention follows the convention used in Dept ID descriptions, where the first character designates the control point.

The screenshot shows a web interface titled "SpeedTypes". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a text input field labeled "SpeedType Key:" containing the text "F\_CO\_Suppl". A red box highlights this input field. Below the input field is a yellow "Add" button. At the bottom of the interface, there are two links: "Find an Existing Value" and "Add a New Value".

1 <sup>st</sup> Character	Control Point
M	School of Medicine
D	School of Dentistry
N	School of Nursing
P	School of Pharmacy
F	FAS
E	Executive Vice Chancellor & Provost
C	Office of the Chancellor
W	Chancellor's Campus-wide
G	Foundation
V	Development
R	University Relations

**ORACLE**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | http

### SpeedType Definition

SpeedType Key: F\_CO\_SUPPL

\*Effective Date: 03/01/2014 \*Status: Active

Description: Controller's Office supplies/m

Notes:

**Security Option:** (What's this?)

- All users
- Specific user
- All users in department 408041

**Interested Parties:** (What's this?)

*GL Unit	*Fund	Dept ID	Project	Act Per	Func	Flex
SFCMP	5150	408041	8800000		72	

Save Notify **Chartstring** Add Update/Display Include History Correct History

- **Effective Date** defaults to current date
  - By using effective dated rows you can set up multiple activity periods for a sponsored project. Notes: This will mimic the way Activity Period is determined in PPS.
  - For example, if the date range for Activity Period 01 is July 1, 2014 – June 30, 2015, then the **Effective Date** would be 07/01/2014. For Activity Period 02, with a date range of July 1, 2015 – June 30, 2016, **Effective Date** would be 07/01/2015.

Find | View 1 | First 1-2 of 2 | Last

\*Effective Date: 07/01/2015 \*Status: Active

Description: Research Study MH53212

Notes:

**Security Option:** (What's this?)

- All users
- Specific user
- All users in department 133100

**Interested Parties:** (What's this?)

*GL Unit	*Fund	Dept ID	Project	Act Per	Func	Flex
SFCMP	4000	133102	120152A	02	40	

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\*Effective Date: 07/01/2014 \*Status: Active

Description: Research Study MH53212

Notes:

**Security Option:** (What's this?)

- All users
- Specific user
- All users in department 133100

**Interested Parties:** (What's this?)

*GL Unit	*Fund	Dept ID	Project	Act Per	Func	Flex
SFCMP	4000	133102	120152A	01	40	

- **Security Options** only apply to PeopleSoft Online Journals.
  1. If “All Users” is selected, anyone may use this SpeedType, and all of these SpeedTypes will show up in the selection list on the journal line.
  2. If “Specific User” is selected only that user may enter/select that SpeedType. It will only show up in the specific user’s selection list (along with the “all users” SpeedTypes).
  3. If “All users in department xxxxxx” is selected, only users with a home department that is in that branch of the tree may enter/select that SpeedType.

**Note:** BearBuy and other systems ignore this security, which means any user can enter any SpeedType in BearBuy, MyExpense, and Connexus,
- **Interested parties** identified in the set-up will be notified if the system changes the SpeedType status to inactive if the chartstring is no longer valid
- SpeedType setup requires a valid chartstring to accommodate non-PeopleSoft systems (e.g., BearBuy, MyExpense).
  - **GL Unit** is based upon the Business Unit default in the user profile of the creator. It may be changed as long as it passes the combo edit validation.
  - When the SpeedType is saved, the chartfield combination will be validated. If invalid, the SpeedType cannot be saved. If valid, the SpeedType will be available for use in BearBuy and GL within minutes upon save.

## SpeedType Search

A search page will be available for all users via *My Access* to search for SpeedTypes by SpeedType value or Department. If a user enters a **Dept ID**, then all SpeedTypes that have that **Dept ID** in the chartstring will display in a list.

### SpeedType Search

Enter a SpeedType to see the associated chartfield values. You can also search for SpeedTypes by entering a department ID.

**SpeedType**

(6-10 character unique ID)

or

**Department ID**

SpeedType	Description	Access	Fund	Dept ID	Project	Act Per	Function	Flexfield