Creating and Using SpeedCharts

This guide explains how to set up SpeedCharts that can be used to complete your department's required ChartField combinations in just two clicks. This instruction guide is updated for the myUFL 9.1 Financials Upgrade.

SpeedChart Benefits
• Helps guard against wrong ChartField combinations (Combo Errors)
• Allows for faster transaction processing
• Reduces the need to memorize multiple long ChartField strings

Instead of repetitively entering the same ChartField information for each transaction, a short cut can be used to populate needed ChartFields for you. A SpeedChart is that short cut. Multiple ChartFields are combined together under one name (SpeedChart Key). When you select the desired SpeedChart, the fields populated will reflect those you included when setting up the SpeedChart. To complete the transaction, you will only need to input the rest of the needed ChartField information. Use the Speedchart when creating a voucher or when reconciling a PCard.

Creating a SpeedChart

NOTE: To complete this task, you must have at least one of the following security roles:

UF_AP_VOUCHER_PROCESSOR
UF_AP_CORE_MANAGER
UF_AP_APPROVERUF_EX_EMPLOYEE
UF_EX_MANAGER
UF_PO_PCARD_RECONCILER
UF_PO_PCARD_APPROVER

NOTE: The ability to create SpeedCharts is only available in the Accounts Payable and Purchasing modules.

1. **Navigation:**

▶ Log on to myUFL (my.ufl.edu) using your GatorLink username and password.
▶ Navigate to: Nav Bar > Main Menu > Financials > Setup Financials/Supply Chain > Product Related > Procurement Options > Management > SpeedChart
▶ If the "SpeedChart" link is unavailable, you do not have an appropriate security role (check with your Department Security Administrator)
▶ At the SpeedChart screen, click the "Add a New Value" tab

2. **Creating a New Speedchart**:

▶ At the **Add a New Value** tab:
- ▶ **Set ID** field: "UFLOR" is the default value
- ▶ **SpeedChart Key** field: Enter a name for this SpeedChart. In the future, retrieve the SpeedChart by this name. When completing tasks in myUFL (AP, PO, PCard), only you will be able to use the SpeedCharts you created. Each user must set up his or her own SpeedChart(s). The SpeedChart Key Field is limited to 10 characters (letters and digits are accepted)
- ▶ **User ID** field: Enter your UFID
- ▶ **Primary Permission List** field: Leave blank
- ▶ **Effective Date** field: Enter date to begin use. (Note that the SpeedChart will not be available if a transaction date is earlier than the Effective Date.)
- ▶ IMPORTANT: **SetID**, **SpeedChart**, and **Effective Date** CANNOT be changed after **Add** has been clicked
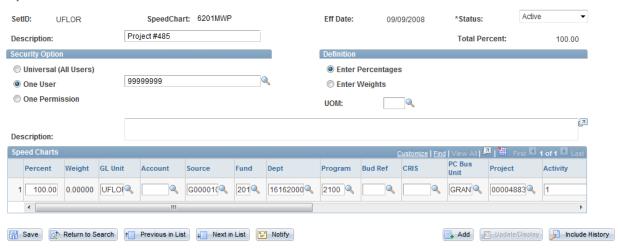 - o Click the **Add** button

3. **Completing the Speedchart**

▶ At the **SpeedChart** tab:
- ▶ **Description** field: May be used to explain purpose and use of this SpeedChart. For example, it may be the ChartFields combination used for a certain project. This may be used to complement information provided in the SpeedChart Key field (above)
- ▶ **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 appropriate 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
- ▶ **ChartFields:** Complete only the fields you would like saved.
  - ▶ **GL Unit**: Use the lookup to find "UFLOR" or other GL Unit needed
  - ▶ **Account**: Leave blank (best practice). Rather than include an Account in the SpeedChart, a better practice is to enter the correct Account Code when completing the revenue or expense transaction
  - ▶ **Source**: Enter the appropriate Source of Funds code as required
  - ▶ **Fund**: Enter the appropriate Fund Code for the ChartField combination
  - ▶ **Dept**: Enter the appropriate Department ID for the ChartField combination
  - ▶ **Program**: Enter the appropriate Program Code for the ChartField combination
  - ▶ **Bud Ref**: CRRNT
  - ▶ **CRIS**
  - ▶ **PC Bus Unit:** This is always "GRANT" if the project is a sponsored project
  - ▶ **Project:** Enter a project ID number if used in this ChartField
  - ▶ **Activity:** For a sponsored project, the Activity is always "1"

▶ **Flex**: If needed, enter the appropriate Flex Code for the ChartField combination. Optional field used by departments, if desired, for their own reporting requirements

▶ Complete any other ChartFields needed

▶ Review for accuracy. Saved information CANNOT be deleted. It can be set to inactive
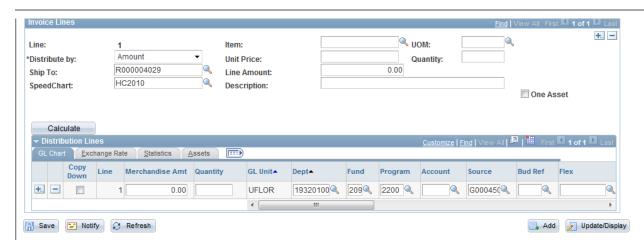
▶ Click the **Save** button

4. **Retrieving the Speedchart**

▶ To use a SpeedChart instead of entering data, at the voucher or PCard statement,

  o Locate the SpeedChart field or checkbox, typically located above the ChartField distribution line

    ▪ Click the Lookup icon, then select or enter your established SpeedChart Key to populate the ChartField combination, or

    ▪ Click on the checkbox to enable the field with the Lookup icon. Enter your SpeedChart Key into the field provided. This will fill the ChartFields with your pre-selected ChartFields.

Notes

▸ With certain Fund Codes, other ChartFields must also be used to have a proper ChartField combination

▸ Please see additional resources at the ChartFields Toolkit related to ChartField use and ChartField combinations: http://hr.ufl.edu/training/myUFL/Toolkits/

▸ When setting up a SpeedChart, SetID must be "UFLOR." Do NOT change the "SetID"

If you need help with…
• Technical issues, contact the UF Help Desk:
- 392-HELP
- helpdesk@ufl.edu
• Policies and Directives, contact the Purchasing and Disbursement Services:
- 392-1331
- purchasing@ufl.edu
- http://www.purchasing.ufl.edu/

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