

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

New Feature Availability in Requisitions - Speedcharts

Scope: This PeopleSoft Financials Information Release applies to Enterprise Financial Business Units LSUNO and LSUSH. Requisition Users will be able to select a speedchart to facilitate data entry and reduce keying errors.

Purpose: This information release serves as notification of the feature availability and provides a detailed document on the usage steps.

Modules: This release applies to PeopleSoft Financials 9.1, PRD databases, Purchasing Module

Using SpeedCharts To Simplify Data Entry

A SpeedChart is a shortcut the users can enter to automatically fill in the individual ChartField values on the distribution line. The use of SpeedCharts can greatly increase data entry efficiency by reducing the number of keystrokes required to enter frequently used combinations of Chartfield values and by reducing keystroke errors.

Please review the following definitions on SpeedChart, ChartField and ChartString used in this training document.

- SpeedChart – is a combination of ChartFields, excluding the Account Code. The Account Code is not part of the SpeedChart values and needs to be entered on the distribution line to complete the ChartString. It is also known as Speedtype.
- ChartField –In Peoplesoft, the Chart of Accounts is comprised of information fields that provide the basic structure to segregate and categorize transactional and budget data. Each informational field is called a CHARTFIELD.
- ChartString – is combining a series of chartfield values to makes up a string.

SpeedCharts are utilized on the Requisition Defaults and line distribution page:

- Single SpeedCharts are used on the Requisition default page.
- Multiple SpeedCharts are used on the Requisition line

Single SpeedChart:

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

The Single SpeedChart is located on the Requisition defaults page, above the distribution line and always overwrites existing ChartField values entered on the requisition. You will need to select the SpeedChart before you input the Account Code chartfield value of the ChartString.

Distribution line prior to selecting a SpeedChart

1. If you know the SpeedChart you want to use you can enter the complete SpeedChart Key or you can enter part of the SpeedChart Key, click the lookup icon and select a SpeedChart from the list.

Note: If you cannot find a SpeedChart that contains the values for which the item(s) is being charged, you can enter the ChartString values on the distribution line as we do now.

Search Results

View 100 First ◀ 1-5 of 5 ▶ Last

SpeedChart Key	Description
0051600000	405020000 COM DISORDERS-GRATIS
0051600001	COMM DISORDERS
0051600002	COMM DIS-LAB FEES
0051600006	COMM DISO-RESEARCH

2. The ChartField values are filled in as indicated in the screenshot below. Please enter the account value to complete the ChartString.

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

- If you want to split the charges between multiple ChartString on the requisition default page, you can add another distribution line by clicking on the Plus Sign (Add Multiple New Rows Button) located at the end of the distribution line.



Note: You cannot select a SpeedChart for the second distribution line; doing so will overwrite the ChartField values on the **first distribution line**.

- The new row will display the values from the distribution line 1. Update the ChartString Values on line two to charge to the correct ChartString, and apply the percentage of distribution to each line.

Dist	Percent	GL Unit	Account	Alt Acct	Dept	Location	IN Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit	Activity
1	100.0000				1051600	LSUNO		111	00026	10105	10/20/2014			
2					1051600	LSUNO		111	00026	10105	10/20/2014			1

Note: If there are multiple items being ordered and charged to different Chartstrings, you can choose to enter the ChartString on each line instead of at the requisition defaults.

Using Multiple SpeedCharts per Line Item

Use this procedure when you want to split the charges or overwrite an existing ChartField at the PO and Requisition line level

The Multiple SpeedCharts functionality provides you with the ability to choose whether you want to override or append multiple SpeedCharts to existing ChartField Values. You can use multiple SpeedCharts to automatically calculate distribution quantities, amounts and percentages.

- Navigation:** Click on the Schedule Icon on the line item you wish to split the charges for, then click the Distribution/ChartFields Icon
- Click on the Multi-SpeedCharts link



- If you know the SpeedChart you want to use you can enter the complete SpeedChart Key or you can enter part of the SpeedChart Key, click the lookup icon and select a SpeedChart from the list.

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

- Click the Plus sign to add the second distribution line.
- Enter how you want the distribution the charges. In this example the quantity was distributed equally between the two ChartStrings.

SpeedCharts Process Option
 Append Overwrite

SpeedChart Selections Personalize | Find | View All

*SpeedChart	Quantity to Distribute
1 0051600002	50.0000
2 0051600006	50.0000

Note: A callout bubble points to the '50.0000' values with the text 'Distribute by Quantity -'. The values are highlighted with a red box in the original image.

Overwrite a SpeedChart:

In this Scenario, incorrect ChartField value information was entered for this line item

Percent	Quantity	Merchandise Amount	GL Unit	Account	Dept	*Location	IN Unit	Fund	Program	Class	Budget Date	Project
100.0000	1.0000	1,000.00	LSUNO	555000	1492500	LSUNO		113	20001	35200	09/08/2014	149250100A

- You can lookup the SpeedChart information to find the correct SpeedChart. Refer to the SpeedChart lookup documentation for assistance.
- The SpeedCharts for the department is displayed, find the SpeedType Key that list the the ChartString values you want to use for the line item.

View All

SetID	SpeedType Key	LSU IA Number	LSU Account Number	Description	Fund Code	Class Field	Program Code	Account	Department	Project
LSUNO	0492500001	205251	449660011	NEUROLOGY	111	10105	00001	(blank)	1492500	(blank)
LSUNO	0492500002	205250	449660000	NEURO-GRATIS	111	10105	00500	(blank)	1492500	(blank)
LSUNO	0492500007	205253	449660007	NEURO-DEAN ALLOC	111	10105	00650	(blank)	1492500	(blank)
LSUNO	0492500008	205261	449660121	NEURO-RESEARCH	111	10105	10001	(blank)	1492500	(blank)

- Enter the Key in the SpeedChart search field. The ChartString values have been changed.

SpeedChart:

Distributions

Details Asset Information

Dist	Percent	GL Unit	Account	Dept	Location	IN Unit	Fund	Program	Class	Budget Date	Project
1	100.0000			1492500	LSUNO		111	00001	10105	10/21/2014	

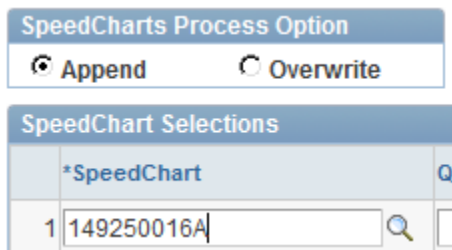
Append SpeedChart

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

In this Scenario you want to append a new ChartString to an existing one, creating a second distribution row.

Navigation: Click on the Schedule Icon on the line item you wish to split the charges for, then click the Distribution/ChartFields Icon

1. Click the Append button
2. Enter the ChartField Key
3. Click the Ok button



4. The append SpeedChart action creates a second distribution line. Update the second distribution to change the percentage of distribution and add the account code.

Distributions													
Chartfields													
Details													
Asset Information													
Budget Information													
Distrib	Percent	Quantity	Merchandise Amount	GL Unit	Account	Dept	*Location	IN Unit	Fund	Program	Class	Budget Date	Project
1 Open	100.0000	40.0000	800.00	LSUN		1492500	LSUNO		113	10001	35200	10/21/2014	149250016A
2 Open		0.0000	0.00	LSUN		1492500	LSUNO		113	10001	35200	10/21/2014	149250016A

Lookup SpeedChart Information: The SpeedChart information can be found in the SpeedType lookup.

Navigation: Main Menu>LSU Process>LSU SpeedType Lookup

Note: In this example we are searching for all the SpeedCharts for a specific Department.

1. Enter your Business Unit in the SetID field and the Department ID you wish to search for and click the Search Button

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

▼ Search Criteria

SetID:	begins with ▼	<input style="width: 95%;" type="text" value="LSUNO"/>	
SpeedType Key:	begins with ▼	<input style="width: 95%;" type="text"/>	
LSU IA Number:	begins with ▼	<input style="width: 95%;" type="text"/>	
LSU Account Number:	begins with ▼	<input style="width: 95%;" type="text"/>	
Description:	begins with ▼	<input style="width: 95%;" type="text"/>	
Fund Code:	begins with ▼	<input style="width: 95%;" type="text"/>	
Class Field:	begins with ▼	<input style="width: 95%;" type="text"/>	
Program Code:	begins with ▼	<input style="width: 95%;" type="text"/>	
Account:	begins with ▼	<input style="width: 95%;" type="text"/>	
Department:	begins with ▼	<input style="width: 95%;" type="text" value="1673000"/>	
Project:	begins with ▼	<input style="width: 95%;" type="text"/>	
Federal A-21 Cost Category:	begins with ▼	<input style="width: 95%;" type="text"/>	

Include History Case Sensitive

2. Select the SpeedChart you wish to review from the search results

Search Results

[View All](#)

SetID	SpeedType Key	LSU IA Number	LSU Account Number	Description	Fund Code	Class Field	Program Code	Account	Department	Project
LSUNO	0673000001	216171	488150511	INFO TECHNOLOGY	111	10105	54000	(blank)	1673000	(blank)
LSUNO	0673000002	216172	488150512	COMP SERV-MCAID ELIG	111	10105	54011	(blank)	1673000	(blank)
LSUNO	149650047F	542086	488154543	OFFC RISK MGNT	113	25200	54000	(blank)	1673000	149650047F
LSUNO	149700076I	543659	488154587	JUVENILE JUSTICE SYS	113	25200	54000	(blank)	1673000	149700076I
LSUNO	149700076S	543643	488154588	488154588 JUVENILE JUSTICE SYS	113	25200	54000	(blank)	1673000	149700076S
LSUNO	149700080K	543280	488154565	488154565 JUVELINE JUSTICE SYS	113	25200	54000	(blank)	1673000	149700080K

3. The SpeedChart information is displayed

Information Release
2014_10_SPEEDCHART_REQUISITION_USAGE

SetID: LSUNO	Speed Type: 149700089L	488154538 JUVENILE JUSTICE SYS
Legacy Account Information		
SpeedType Key		
Acct Number: 488154538	IA Number:	544561

Chartfields

Department:	1673000	Information Technology-Admin
Account:		
Project	149700089L	JUVENILE JUSTICE SYSTEM
Fund Code:	113	RESTRICTED FUND
Program Code:	54000	General And Administrative
Class Field:	25200	State G & C-Account Category

4. If you want to use this SpeedChart when creating your requisition, please make a note of the SpeedType Key to enter in the SpeedChart search field.