Using SpeedCharts for ChartField Strings

This guide describes how to set up SpeedCharts that can be used to complete your department’s required ChartField string(s) in just two clicks. SpeedCharts make entering a ChartField string much more convenient.

ChartFields are used for financial transactions at UF. They are standardized numbers that make up the backbone of UF’s accounting system. They must be used in proper combination for revenue and expense transactions. To learn about ChartFields, see the pre-class web tutorial on “ChartFields” at http://www.bridges.ufl.edu/ledger/ChartField.pps as well as the “Required ChartFields” documentation at http://www.bridges.ufl.edu/ledger/RequiredCFs.xls.

A special thank you to Louis P. Giovagnorio, a senior accountant from UF’s Department of Physiology and Functional Genomics, who helped document the steps required to set up SpeedCharts.

NOTE: To follow this process, you must have at least one of these security roles:
- UF_PO_DEPARTMENT_APPROVER
- UF_PO_INITIATOR
- UF_PO_PCARD_RECONCILER
- UF_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 Financials/Supply Chain > Product Related > Procurement Options > Management > SpeedChart
  - If the “SpeedChart” link is unavailable, you do not have the proper security
- At the SpeedChart screen, click the “Add a New Value” tab
- At the "Add a New Value" screen:
  - Leave "Set ID" as UFLOR
  - Complete the "SpeedChart" field with a name of your choice. 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. They cannot be shared
    - 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 "Add"
    - IMPORTANT: "SetID," "SpeedChart," and "Effective Date" CANNOT be changed after “Add” has been clicked
- At the SpeedChart screen:
  - At the "Description" field, enter a better or more complete description if desired
  - IMPORTANT: Ensure "Security" = “ONE USER”
    - If “Security” = “Universal,” then your ChartField string will be available for use by all UF employees with proper security

- Next, enter the appropriate "ChartField" combination. Not all fields are required. Enter as many or as few as needed or appropriate. Be sure to review the “Required ChartField” information at http://www.bridges.ufl.edu/ledger/RequiredCFs.xls for details about correct ChartField combinations
  - "GL Unit" = UFLOR
    - GL stands for General Ledger
"DeptID" = Enter the appropriate Department ID for the ChartField string
  Used to identify your organizational structure

"Fund" = Enter the appropriate Fund Code for the ChartField string
  Answers the question, "From where does your department’s money come?"

"Program" = Enter the appropriate Program Code for the ChartField string
  Answers the question, "Why are you doing the action?"

"Account" = Best Practice: Leave blank
  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 string
  Answers the question, "Who’s the outside funding source?"

"Bud Ref" = CRRNT
  Answers the question, "When is the activity happening?"

"Flex" = If needed, enter the appropriate Flex Code for the ChartField string
  Optional field used by departments, if desired, for their own reporting requirements

"ID" = Leave blank

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 changed or deleted

Click "OK" to save

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 string 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 view icon already available. Simply click on the magnifying glass view icon, then select your established SpeedChart to populate the ChartField string.

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 for your use.

NOTES
Be sure to 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"