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:**
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.

   ![Look Up SpeedChart](image)

   **SetID:** LSUN0
   **SpeedChart Key:** begins with 00516

   ![Search Results](image)

   **View 100 First 1 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.
3. 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.

4. 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.

**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.

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

2. Click on the Multi-SpeedCharts link

3. 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.
4. Click the Plus sign to add the second distribution line.

5. Enter how you want the distribution the charges. In this example the quantity was distributed equally between the two ChartStrings.

**Overwrite a SpeedChart:**

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

1. You can lookup the SpeedChart information to find the correct SpeedChart. Refer to the SpeedChart lookup documentation for assistance.

2. 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.

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

**Append SpeedChart**
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.

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

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<th>SetID</th>
<th>SpeedType Key</th>
<th>LSU IA Number</th>
<th>LSU Account Number</th>
<th>Description</th>
<th>Fund Code</th>
<th>Class Field</th>
<th>Program Code</th>
<th>Account</th>
<th>Department</th>
<th>Department</th>
<th>Project</th>
<th>Federal A-21 Cost Category</th>
<th>View All</th>
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</tbody>
</table>

3. The SpeedChart information is displayed
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.