Understanding, Creating & Maintaining SpeedTypes

UCSF Controller's Office

What is a SpeedType?

To ensure transactions are correctly recorded in the General Ledger, financial administrators may establish **SpeedTypes**, which are 6-10 character shortcuts for commonly used chartfield combinations. SpeedTypes are used in transactional systems such as **PeopleSoft**, **BearBuy**, **Connexxus**, **MyCores**, and **MyExpense**. When a SpeedType is entered, it automatically expands into your predefined chartstring. Use of SpeedTypes is recommended for situations where department users may be unfamiliar with the full chartstrings.

Departments are responsible for creating and maintaining SpeedTypes.

SpeedTypes *do not* constitute purchasing authority.

SpeedType Supported System	Comments
PeopleSoft	*Not available* for Recharge units uploading flat files via Batch Journal Process
BearBuy	
Connexxus (Travel Portal)	Direct billing of airline tickets to University fund sources in Connexxus *requires use* of SpeedType
MyCores	*Requires* the use of SpeedType

SpeedType Search

SpeedType Search is available from three locations:

1. **MyAccess** – Log into MyAccess, scroll down or search and select '**SpeedType Search and Chartfield Validator**'

2. **Controller's Office website 'Inquiry Reports'** – From the Controller's Office home page:

   a. Click on the '**Inquiry Reports**' tab

   b. Click '**SpeedTypes**'

   c. (Not shown) Click the '**SpeedType Search and Chartfield Validator**' link at the bottom of the page

3. **PeopleSoft menu** – Log into **PeopleSoft** from **MyAccess** and click on '**Main Menu**'. Scroll down the menu and click the '**SpeedType Srch & COA Validator**' link
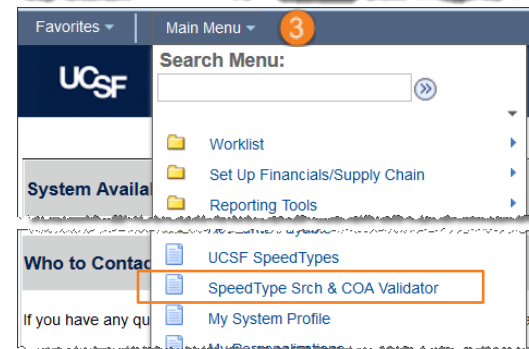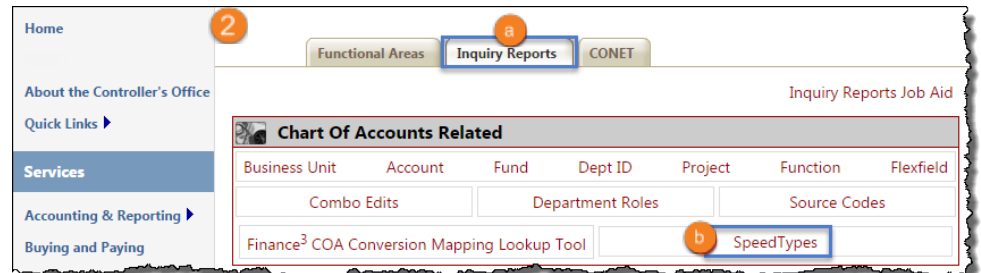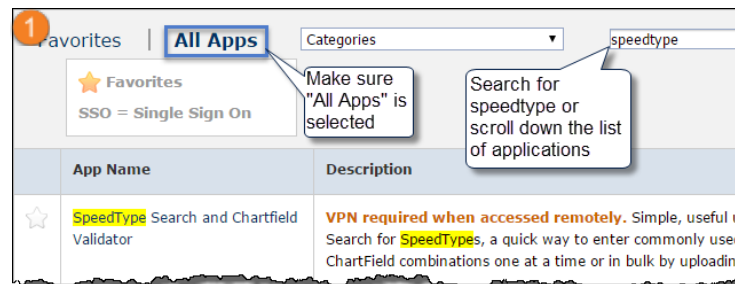
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How to Search for SpeedTypes and Export Search Results

On the **SpeedType Search** page, enter your search criteria in one or more fields, and then click the **Search** button. You can search by **SpeedType**, **Fund**, **Department ID**, **Project**, **Function**, **Flexfield**, and/or **PI** (Principal Investigator).

You can export your search results to an Excel file by clicking the ⊞ icon on the top row of your search results. When the Excel file is ready, you will be prompted to either Open or Save the file.

SpeedType Entry in PeopleSoft - Example

When you enter a valid SpeedType in **PeopleSoft**, the chartstring values associated with the SpeedType will automatically be saved in the appropriate fields. A specific SpeedType will include only the individual chartfields saved for that SpeedType. The only required chartfields when setting up a SpeedType are **Unit** and **Fund**, thus some SpeedTypes may not expand into a specific Dept ID, Project, Activity Period, Function, or Flexfield.

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SpeedType Setup Guidelines

Who can setup SpeedTypes?

- SpeedTypes are setup and maintained by individual departments
- The "SpeedType Setup" role is provided to Financial Administrators as well as the "Chartfield Setup", "Chartfield Requester", and "Chartfield Approver" roles
- See your Access Administrator if you require the SpeedType Setup role

SpeedTypes will become *invalid* if:

- The effective date expires
- A part of the chartstring becomes inactive
- A change to rules causes a once valid chartstring to fail the nightly combo edit validation check

Helpful Hints for Setting Up and Managing SpeedTypes	
DO: Create a naming convention for your department's SpeedTypes (see recommendations below).	**DO NOT**: Set up a SpeedType for chartstrings used only in PPS. *PPS does not use SpeedTypes*.
DO: Set up SpeedTypes for BearBuy Requesters who may be confused by direct chartfield entry.	**DO NOT**: Set up a SpeedType for one-time only transactions unless used for MyCores or Connexxus direct billing.
DO: Set up SpeedTypes for faculty and staff who complete their own MyExpense reports and might be unfamiliar with the chartfields.	**DO NOT**: Set up a SpeedType for a chartstring that is only used in financial journals, e.g. transfer transactions.
DO: Run a SpeedType inquiry to find out if a SpeedType already exists for your chartstring before creating a new SpeedType.	
DO: Use effective dated rows to set up SpeedTypes for sponsored projects with multiple Activity Periods	

SpeedType Setup Requirements and Validation

- SpeedTypes are effective dated (default is the date of entry)
- Must be at least six alphanumeric characters long with a maximum of ten characters
- Cannot contain special characters, e.g. @#$%^[ ]
- SpeedTypes intended for use in MyCores or Connexxus cannot include underscores (_), hyphens (-), or any other special characters
  - SpeedTypes are validated against combo edit rules and must be valid or the SpeedType cannot be saved. If valid, the saved SpeedType will be available to all systems within a few minutes.
- Business Unit is based on the creating user's profile

Recommended SpeedType Naming Convention Guidelines

- To make SpeedTypes easier to find, use the first character of any new SpeedType to designate the Control Point as shown in the chart to the right.

- Departments should develop a naming convention for the remaining characters in the SpeedType.

1st 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

Remember: SpeedType setup does not have workflow, so anyone with the proper access may create, change or inactivate any SpeedType

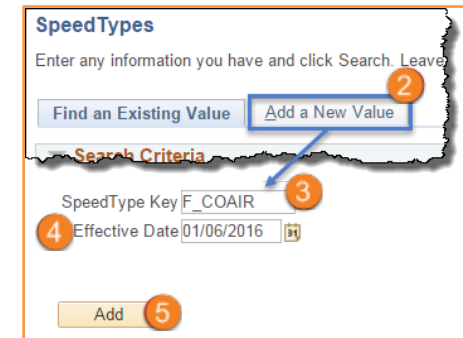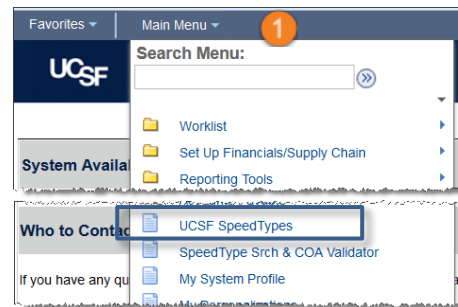# Understanding, Creating & Maintaining SpeedTypes

Creating New SpeedTypes

SpeedTypes are added via **PeopleSoft**:

1 Click on the **Main Menu**, and scroll down to select **UCSF SpeedTypes**

2 The **SpeedTypes** page displays; click the **Add a New Value** tab

3 Enter a **SpeedType Key** name between six and ten alphanumeric characters using your department's naming convention and the recommendations on Page 3. Do not use special characters such as "@ # $ % ^ [ ]"

4 Accept the current date (default), or choose the date you want your new SpeedType to become effective

5 Click the **Add** button

The PeopleSoft **SpeedType Definition** page displays; enter:

6 **Effective Date** – can be edited here, if needed

7 **Description –** enter a description of the SpeedType

8 **Notes** (Optional) – enter any notes to further describe how or where this SpeedType should be used

9 **Security Option** – best practice is to allow **all users** to access the SpeedType as the other options severely limit its usefulness. If you choose a specific user, enter the Employee ID in the **Specific User** field. If limiting by department, enter the Dept ID in the **All users in department** field.

10 **Interested Parties** (Optional) – receive an email if the SpeedType becomes inactivated. Enter as many email addresses as you like, separated by commas.

11 Enter the desired chartstring components**. Unit** and **Fund** are required fields.

12 Click the **Save** button. If validation fails, correct and **Save** again.

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Adding Effective Dated Rows for Multiple Activity Periods

Use effective dating to set up multiple Activity Periods on sponsored projects.

To Add an Effective Dated Record to an Existing SpeedType:

1 (Not shown) Follow steps **1** - **4** of the previous section, entering the key of the SpeedType you want to change.

To Add Effective Dated Rows for Multiple Activity Periods:

2 Click the ➕ icon to set up new activity periods/effective dates and chartstrings for each period. Enter **Effective Date** to reflect the length of each activity period:

  a For example, if the date range for Activity Period 01 is 01/01/16 to 12/31/16, then the **Effective Date** is 01/01/16.

  b If Activity Period 02 is 01/01/17 to 12/31/17, then the **Effective Date** is 01/01/17 for period 02.

Repeat the steps for as many records as needed. If too many lines are added, remove them by clicking the ➖ icon.

Effective dates begin automatically, and previous periods are automatically inactivated when the new period begins.

3 Click the **View All** link to see all Effective Dated rows, or use the page arrows to display the next/previous entry

> Find | View All | First ◀ 1 of 2 ▶ Last

4 After you complete the entry, click the **Save** button. This will take some time to complete as combo edit is running to validate the chartstrings. If validation fails, make corrections and **Save** again.

Inactivating an Established SpeedType

1 Create a new row by clicking the ➕ icon. Change the **Effective Date** on the new row to the date you want the SpeedType to become **Inactive**. (See Steps 1-3 above for more detail.)

2 Change the **Status** drop-down menu to **Inactive**

3 (Not shown) Click the **Save** button.

The SpeedType will be *deactivated* as of the **Effective Date**

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Changing an Established SpeedType

You can change any aspect of a previously established SpeedType, *except for the name*, as follows:

① (Not shown) Click on the **Main Menu**, and scroll down to select **UCSF SpeedTypes.**

② On the **Find an Existing Value** tab, enter all or part of the **SpeedType Key** name you wish to edit.

③ Click the **Search** button.

   ⓐ If only one SpeedType matches your search criteria, the **Speed Type Definition** page displays automatically.

   ⓑ If more than one SpeedType Key matches your search criteria, select the appropriate item from the **Search Results** list to open the **Speed Type Definition** page.

④ To edit any aspect (except the name) of a Speed Type, create a new row by clicking the ➕ icon.

⑤ Enter the **Effective Date** for the changes.

Make adjustments to **Security Options**, **Interested Parties**, or any of the chartstring fields.

⑥ Click the **Save** button.

The SpeedType changes will be *activated* as of the **Effective Date**

💡 To change the *name* of a SpeedType, you will first need to set up a **new replacement SpeedType** with the appropriate name and chartstring information. Then follow the steps on Page 5 to **inactivate the previous SpeedType.**