

FloridaPALM

Planning, Accounting, and Ledger Management



SEGMENT IV DESIGN WORKSHOP

SEPTEMBER 11, 2024

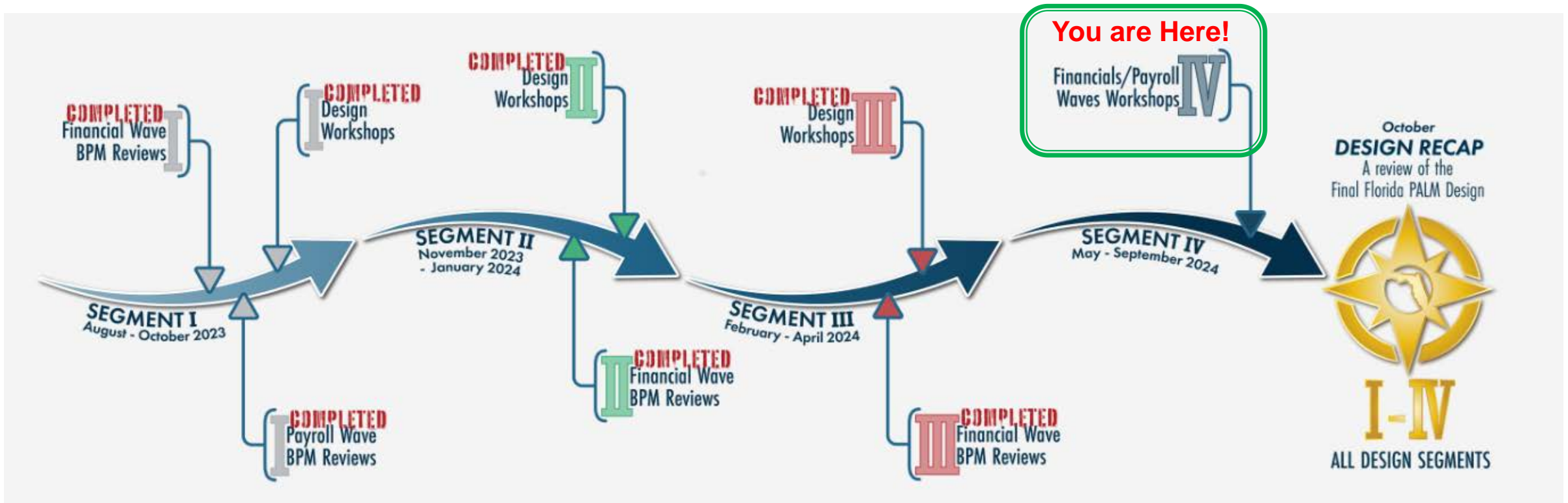


Agenda

- ▶ Welcome and Introductions
 - Housekeeping
- ▶ What is a SpeedKey
- ▶ SpeedKey Configuration & Page Mockup
- ▶ SpeedKey Usage
- ▶ SpeedKey Approval Process
- ▶ Key Things to Know About SpeedKeys
- ▶ SpeedKey Interfaces and Report
- ▶ SpeedKey Configuration Workbook



Design Phase Overview



For more information, listen to [Episode #11: The Design Phase](#)



SPEEDKEY OVERVIEW



SpeedKey Overview

What is a SpeedKey?



Definition

A SpeedKey is a predefined shortcut in Florida PALM used to automatically populate ChartField values in transactions



Purpose

Simplifies data entry, reduces errors, and improves transaction efficiency by allowing users to select a pre-configured set of ChartFields rather than entering them manually

SpeedKey Overview

SpeedKey Configuration Data Elements

01 **SetID:** The SetID value will always correspond to the agency's Business Unit.

02 **SpeedKey:** A unique name up to 10 alphanumeric characters. This concise, memorable name is what users enter during transactions.

03 **Description:** A brief summary describing the purpose of the SpeedKey, limited to 30 characters.

04 **Line Type:** Specifies the SpeedKey Line Type of Single Line or Multiple Line.

05 **Effective Date:** Indicates when the SpeedKey becomes active and available for use.

06 **Payroll Indicator checkbox:** Identifies the SpeedKey is being established for use in the HCM application for payroll processing.

07 **PCard Indicator checkbox:** Identifies the SpeedKey is being established for use in the Works System.

08 **Percentage:** Specifies the SpeedKey Line distribution percentage. Multiple Line SpeedKeys can have distinct percentages on each line, but must be positive and total 100%.

09 **Sequence Number:** Uniquely identifies each SpeedKey line. For Multiple Line SpeedKeys, the sequence starts at 1 and continues sequentially across the distribution lines.

10 **Chart of Accounts:** All Florida PALM ChartFields, including Project-related ChartFields, are available for configuration on the SpeedKey Setup Page.



SpeedKey Overview

SpeedKey Page Mockup

SpeedKey

[Add a New Value](#) [Find an Existing Value](#)

*SetID
*SpeedKey
*Accounting Line Type

Card Indicator
Approval

Find | View All First **1 of 1** Last

*Effective Date Total Percent 100
*Status Total Distribution Lines 1 [Attachments](#)

ChartField Distributions

Find | View All | First **1 of 1** Last

ChartFields	Percent	GL Business Unit	Organization	Account	Fund	Budget Entity	Category	State Program	Grant	Contract
1	<input type="text"/>	43000	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>



SpeedKey Overview

SpeedKey Page Mockup

SpeedKey

SpeedKey

Add a New Value

*S
*Speed
*Accounting Line

Add

SetID 43000 *Description

Payroll Indicator PCard Indicator

Submit View Approval

SpeedKey TRAVELEXP Line Type Multiple Line Module AP/PO

Approval Status None

Effective Date Find | View All First 1 of 1 Last

*Effective Date 08/26/2024 Total Percent 100

*Status Active Total Distribution Lines 1 Attachments

ChartField Distributions Find | View All | First 1 of 1 Last

ChartFields

Percent	GL Business Unit	Organization	Account	Fund	Budget Entity	Category	State Program	Grant	Contract
1	43000	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save Notify Add Update/Display Include History Correct History



SpeedKey Overview



Questions?

SpeedKey Overview



SpeedKey Overview

▶ **What is the primary purpose of a SpeedKey in Florida PALM?**

- a) To replace Chart of Accounts in Florida PALM
- b) To automatically populate ChartField values in online transactions
- c) To generate random ChartField values for transactions

Answer: B

▶ **Which statement about the SpeedKey name is correct?**

- a) It can be up to 10 alphanumeric characters, including spaces and special characters
- b) It must be exactly 10 characters and can include spaces and special characters
- c) It can be up to 10 alphanumeric characters and must be concise and memorable

Answer: C

▶ **What must be true for the distribution percentages in a Multiple Line SpeedKey?**

- a) They can be any value, as long as they are whole numbers
- b) They must be positive, greater than zero and total 100%
- c) They must all be equal percentages

Answer: B



SpeedKey Overview

SpeedKey Usage Within Florida PALM

Source Module/Custom Page	Availability	SpeedKey Type
General Ledger	✓	Single
Commitment Control	✓	Single
Accounts Payable	✓	Single, Multiple
Purchasing	✓	Single, Multiple
Inter/IntraUnit	✓	Single
Accounts Receivable <small>(Direct Journal and Item)</small>	✓	Single
Payroll (HCM)	✓	Single
Asset Management	✗	N/A
Cash Management	✗	N/A
Project Costing	✗	N/A
Grants & Contracts Custom Page	✗	N/A



SpeedKey Overview

Single Line vs. Multi-Line SpeedKeys Usage by System

System	Single Line SpeedKeys	Multi-Line SpeedKeys
Florida PALM Financials	Single Line SpeedKeys are allowed in AP, PO, AR, GL, and KK modules	Multi-Line SpeedKeys are allowed in AP and PO modules
Florida PALM HCM (Payroll)	Single Line SpeedKeys are allowed for use in the HCM (Payroll) Application to establish position funding	Not Allowed
People First	Used for one-time payments (e.g., leave payouts), recurring payments (e.g., Uniform Allowance), and overtime	Not Allowed
PCard WORKs	Single Line SpeedKeys are required for use in the PCard WORKs system	Not Allowed
MyFloridaMarketPlace (MFMP)	Single Line SpeedKeys are available for use in MyFloridaMarketPlace (Arriba On-Demand)	Not Allowed
STMS	Single Line SpeedKeys are allowed in the Statewide Travel Management System (STMS)	Multi-Line SpeedKeys are allowed for use in STMS



SpeedKey Overview

Payroll SpeedKeys

Payroll SpeedKeys

- 01** The Payroll Indicator checkbox must be selected and must be configured as a single line
- 02** ChartFields must include Organization, Fund, Budget Entity, Category, State Program, and Account (700001)
- 03** If uses FCO Category (08XXXX or 14XXXX), requires PCBU, Activity, PC Category (Labor), and PC Subcategory (Budget Year)
- 04** Payroll Indicator will be grayed out and cannot be changed to Non-Payroll SpeedKey
- 05** Can only be inactivated or reactivated. No other updates are permitted
- 06** Does not allow more than one active SpeedKey to have the same combination of ChartField values



SpeedKey Overview

PCard SpeedKeys

PCard SpeedKeys

01

The PCard Indicator checkbox must be selected and the SpeedKey must be configured as a single line

02

Fund, Budget Entity, Category, and State Program are the only allowable ChartFields

03

PCard Indicator will be grayed out and cannot be changed to Non-PCard SpeedKey

04

Can be inactivated, reactivated, or updated

SpeedKey Overview

Single Line SpeedKey Page Mockup

SpeedKey

[Add a New Value](#) [Find an Existing Value](#)

*SetID

*SpeedKey

*Line Type

PCard Indicator

Approval Status None [Attachments](#)

Effective Date

[Find](#) | [View All](#) | First **1 of 1** Last

*Effective Date **Total Percent** 100

*Status **Total Distribution Lines** 1

ChartField Distributions

[Find](#) | [View All](#) | | First **1 of 1** Last

[ChartFields](#)

	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	100.00	43000	<input type="text" value="1100000000"/> <input type="button" value="Q"/>	<input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value="00187"/> <input type="button" value="Q"/>	<input type="text" value="43010400"/> <input type="button" value="Q"/>	<input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value="1205000000"/> <input type="button" value="Q"/>	<input type="text" value="10108"/> <input type="button" value="Q"/>



SpeedKey Overview

Single Line SpeedKey Page Mockup

SpeedKey

Add a New Value

*SetID 43000
*SpeedKey GRANTABC
*Line Type Single Line

Add

SpeedKey

SetID 43000 *Description Grant ABC Activity Payroll Indicator PCard Indicator

SpeedKey GRANTABC Line Type Single Line Module All Approval Status None Attachments

Effective Date Find | View All First 1 of 1 Last

*Effective Date 08/29/2024 Total Percent 100
*Status Active Total Distribution Lines 1

ChartField Distributions Find | View All | First 1 of 1 Last

ChartFields	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	100.00	43000	1100000000		00187	43010400		1205000000	10108



SpeedKey Overview

Multiple Line SpeedKey Page Mockup

SpeedKey

Add a New Value Find an Existing Value

*SetID 43000

*SpeedKey HQUTILITY

*Line Type Multiple Line

Payroll Indicator PCard Indicator

Approval Status None Attachments

Effective Date Find | View All | First | 1 of 1 | Last

*Effective Date 07/01/2024 **Total Percent** 100

*Status Active **Total Distribution Lines** 3

ChartField Distributions Find | View All | First | 1 of 3 | Last

ChartFields

	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	20.00	43000	5000000000	704801	57302	43500500	040000	1603000000	
2	30.00	43000	4300000000	704801	39300	43010300	040000	1603000000	
3	50.00	43000	5100000000	704801	07800	43400100	040000	1601000000	



SpeedKey Overview

Multiple Line SpeedKey Page Mockup

SpeedKey

Add a New Value

*SetID: 43000
*SpeedKey: HQUTILITY
*Line Type: Multiple Line

Add

SpeedKey

SpeedKey: 43000 *Description: Headquarters Utilities Payroll Indicator PCard Indicator

SpeedKey: HQUTILITY Line Type: Multiple Line Module: AP/PO Approval Status: None [Attachments](#)

Effective Date Find | View All First 1 of 1 Last

*Effective Date: 07/01/2024 Total Percent: 100
*Status: Active Total Distribution Lines: 3

ChartField Distributions Find | View All | First 1 of 3 Last

ChartFields	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	20.00	43000	5000000000	704801	57302	43500500	040000	1603000000	
2	30.00	43000	4300000000	704801	39300	43010300	040000	1603000000	
3	50.00	43000	5100000000	704801	07800	43400100	040000	1601000000	



SpeedKey Overview

PCard SpeedKey Page Mockup

SpeedKey

Add a New Value
Find an Existing Value

*SetID

*SpeedKey

*Line Type

Indicator PCard Indicator

Approval Status None Attachments

Effective Date Find | View All | First 1 of 1 Last

*Effective Date Total Percent 100

*Status Total Distribution Lines 1

ChartField Distributions Find | View All | First 1 of 1 Last

ChartFields	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	100.00	43000	<input type="text"/>	<input type="text"/>	00081	43200100	040000	1603000000	<input type="text"/>



SpeedKey Overview

PCard Line SpeedKey Page Mockup

SpeedKey

Add a New Value

*SetID

*SpeedKey

*Line Type

SpeedKey

SpeedKey

SetID 43000 *Description Payroll Indicator PCard Indicator

SpeedKey FPEXPENSE Line Type Single Line Module All Approval Status None [Attachments](#)

Effective Date Find | View All First 1 of 1 Last

*Effective Date Total Percent 100

*Status Total Distribution Lines 1

ChartField Distributions Find | View All | First 1 of 1 Last

ChartFields	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	100.00	43000	<input type="text"/>	<input type="text"/>	00081	43200100	040000	1603000000	<input type="text"/>



SpeedKey Overview

Payroll SpeedKey Page Mockup

SpeedKey

Add a New Value Find an Existing Value

*SetID

*SpeedKey

*Line Type

PCard Indicator

Approval Status None Attachments

Effective Date Find | View All First Last

*Effective Date **Total Percent** 100

*Status **Total Distribution Lines** 1

ChartField Distributions Find | View All | Print First Last

ChartFields

	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	100.00	43000	<input type="text" value="6200000000"/> <input type="button" value="Q"/>	<input type="text" value="700001"/> <input type="button" value="Q"/>	<input type="text" value="00079"/> <input type="button" value="Q"/>	<input type="text" value="43200100"/> <input type="button" value="Q"/>	<input type="text" value="010000"/> <input type="button" value="Q"/>	<input type="text" value="1603000000"/> <input type="button" value="Q"/>	



SpeedKey Overview

Payroll Line SpeedKey Page Mockup

SpeedKey

Add a New Value

*SetID

*SpeedKey

*Line Type

SpeedKey

SetID 43000 *Description Payroll Indicator PCard Indicator

SpeedKey FPSALARY Line Type Single Line Module All Approval Status None Attachments

Effective Date Total Percent 100

*Status Total Distribution Lines 1

ChartField Distributions First

ChartFields	Percent	GL Business Unit	Organization	*Account	*Fund	*Budget Entity	*Category	*State Program	Grant
1	100.00	43000	<input type="text" value="6200000000"/> <input type="button" value="Q"/>	<input type="text" value="700001"/> <input type="button" value="Q"/>	<input type="text" value="00079"/> <input type="button" value="Q"/>	<input type="text" value="43200100"/> <input type="button" value="Q"/>	<input type="text" value="010000"/> <input type="button" value="Q"/>	<input type="text" value="1603000000"/> <input type="button" value="Q"/>	<input type="text"/>



SpeedKey Overview



Questions?

SpeedKey Overview



SpeedKey Overview

▶ **In which modules can both Single and Multiple line SpeedKeys be used?**

- a) General Ledger and Purchasing
- b) Accounts Payable and Purchasing
- c) Payroll (HCM) and Accounts Receivable

Answer: B

▶ **Which of the following modules do not support SpeedKeys at all?**

- a) Asset Management, Cash Management, Project Costing
- b) General Ledger, Inter/IntraUnit, Commitment Control
- c) Payroll (HCM), Accounts Receivable, Grants & Contracts

Answer: A

▶ **Which of the following is true for both Payroll and PCard SpeedKeys?**

- a) Both can be updated with new ChartField values
- b) Both have their respective indicators grayed out and cannot be changed to Non-Payroll or Non-PCard SpeedKeys
- c) Both allow multiple active SpeedKeys with the same combination of ChartField values

Answer: B



SpeedKey Overview

- ▶ **What happens when the Payroll Indicator checkbox is selected for a SpeedKey?**
 - a) The SpeedKey can later be changed to a Non-Payroll SpeedKey
 - b) The SpeedKey must be configured as a single line and cannot be changed to Non-Payroll
 - c) The SpeedKey allows multiple active SpeedKeys with the same combination of ChartField values

Answer: B

- ▶ **Which ChartFields are allowed in a PCard SpeedKey?**
 - a) Fund, Budget Entity, Category, State Program
 - b) B) Organization, Fund, Budget Entity, Account
 - c) PCBU, Activity, PC Category (Labor), and PC Subcategory (Budget Year)

Answer: A

- ▶ **Which of the following is true about Payroll SpeedKeys?**
 - a) Can be configured with multiple lines
 - b) Can be updated with new ChartField values
 - c) Must include Organization, Fund, Budget Entity, Category, State Program, and Account (700001)

Answer: C



SpeedKey Overview

SpeedKey Approval Process

Non-Payroll SpeedKey

Agency Role	Transaction Type	Online Configuration	Spreadsheet Upload and Interface
Agency GL COA Processor	<ul style="list-style-type: none"> Create Update COA Values or Description 	Requires Agency GL COA Maintainer Approval	Not Authorized for Role
Agency GL COA Processor	<ul style="list-style-type: none"> Inactivate/Reactivate 	No Approval Required	
Agency GL COA Maintainer	<ul style="list-style-type: none"> Create Update COA Values or Description Inactivate/Reactivate 	No Approval Required	No Approval Required



SpeedKey Overview

SpeedKey Approval Process

Payroll SpeedKey

Agency Role	Transaction Type	Online Configuration	Spreadsheet Upload and Interface
Agency GL COA Processor	Create	<ul style="list-style-type: none"> Requires Agency GL COA Maintainer Approval Requires DFS approval if using a Category other than 010000, 030000, 103290 and 104166 	Not Authorized for Role
Agency GL COA Processor	Inactivate/Reactivate	No Approval Required	
Agency GL COA Maintainer	Create	Requires DFS approval if using a Category other than 010000, 030000, 103290 and 104166	Requires DFS approval if using a Category other than 010000, 030000, 103290 and 104166
Agency GL COA Maintainer	Inactivate/Reactivate	No Approval Required	No Approval Required



SpeedKey Overview

Key Things to Know About SpeedKeys



Effective Date

1

Cannot be earlier than the effective date of included COA values; can be set for a future date if COA values exist



Combination Rule Validation

2

SpeedKeys are validated against applicable combination rules



Payroll and PCard Indicator

3

Non-Payroll and Non-PCard SpeedKeys cannot be changed to Payroll or PCard SpeedKeys



Payroll and PCard SpeedKey Usage

4

Payroll and PCard SpeedKeys are available to be used anywhere single line SpeedKeys can be used (not restricted to HCM and PCard WORKs)



Reporting

5

SpeedKey values in transactions are recorded, but if any ChartField is overridden, reporting based on SpeedKey values will not reflect the actual ChartField values used



Attachment

6

Users can add supporting documents to the SpeedKey setup page

SpeedKey Overview



Questions?

SpeedKey Overview



SpeedKey Overview

- ▶ **When creating or updating a Non-Payroll SpeedKey, who is required to provide approval for the changes if performed by the Agency GL COA Processor?**
 - a) The Agency GL COA Maintainer must approve the creation or updates; while inactivating or reactivating requires no approval
 - b) The DFS Approver must approve all creation and update requests, and the Agency GL COA Maintainer must approve inactivation and reactivation
 - c) The Agency GL COA Processor must receive approval from both the Agency GL COA Maintainer and DFS Approver for all changes

Answer: A

- ▶ **When configuring a Payroll SpeedKey, which of the following scenarios would not require approval?**
 - a) Creating a new Payroll SpeedKey with Category 103290 by an Agency GL COA Processor
 - b) Updating an existing Payroll SpeedKey to Category 010000 by an Agency GL COA Maintainer
 - c) Inactivating an existing Payroll SpeedKey with Category 103290 by an Agency GL COA Processor

Answer: C



SpeedKey Overview

- ▶ **Under which circumstance can a Non-Payroll SpeedKey be reclassified as a Payroll SpeedKey, and what is the correct process?**
 - a) If approved by DFS, updated through an interface, and SpeedKey is reconfigured with a Payroll Indicator
 - b) If updated via spreadsheet upload, but it requires the SpeedKey's attributes to be manually adjusted to include Payroll-specific ChartFields
 - c) A Non-Payroll SpeedKey cannot be reclassified as a Payroll SpeedKey under any circumstances; it requires creating a new Payroll SpeedKey instead

Answer: C

- ▶ **When configuring or updating a SpeedKey, what are the requirements for the effective date?**
 - a) Can be any date as long as it is not later than the date of COA values, allows future dates if COA values exist
 - b) Must be set to the current date and must always be earlier than the date of COA values
 - c) Cannot precede the effective date of the included COA values, future dates are permissible provided COA values are present at creation

Answer: C



SDI004 - Inbound SpeedKey Spreadsheet Upload

What

information is transmitted?



SpeedKey header information and line level information including ChartField values

Why

do I need this?



Used by agencies to create or update SpeedKeys

Who

runs?



Agency GL COA Maintainer

When

should this interface file be sent?



Whenever the user needs to create or update SpeedKeys in Florida PALM

Where

can more information be found?



[Knowledge Center Interface Catalog](#)

SDI007 - Inbound SpeedKey Interface

What

information is transmitted?



SpeedKey header information and line level information including ChartField values

Why

do I need this?



Used by agencies to create or update SpeedKeys

Who

runs?



Batch Process

When

should this interface file be sent?



Daily or ad hoc

Where

can more information be found?



[Knowledge Center Interface Catalog](#)

SDI008 - Outbound SpeedKey Interface

What

information is transmitted?



Delta or full extract; options include status (all, active, or inactive), line type (single-line or multi-line), payroll and PCard indicators, and the ability to include or exclude future-dated SpeedKeys

Why

do I need this?



Used by agencies to consume SpeedKey information, including details on active and inactive SpeedKeys, as well as Payroll, PCard, single-line, and multi-line SpeedKeys

Who

runs?



Batch Process

When

should this interface file be sent?



Daily

Where

can more information be found?



[Knowledge Center Interface Catalog](#)

SDR003 - SpeedKey Report

What

information is transmitted?



Detailed SpeedKey information in XLS format; options include SETID, SpeedKey selection, date range, effective status, line type, Payroll/PCard indicators, and specific ChartField values

Why

do I need this?



Used by agencies to view SpeedKey information, including details on active and inactive SpeedKeys, as well as Payroll, PCard, single-line, and multi-line SpeedKeys

Who

runs?



GL Reporter

When

should this interface file be sent?



As needed (ad hoc)

Where

can more information be found?



Knowledge Center Interface Catalog



SpeedKey Overview

SDR003 - SpeedKey Report Mockup



SPEEDKEY REPORT

SetID: 21000
 Payroll Indicator: All
 PCard Indicator: All
 Line Type: All
 SpeedKey Status: All
 SpeedKey: %
 From Effective Date: 09/01/2023
 To Effective Date: 09/30/2023

Account: From 104000 To 304000

SetID	SpeedKey	Payroll Indicator	PCard Indicator	Line Type	Effective Date	Effective Status	Description	Total Lines	Module	Sequence Num	Percentage	Organization	Account	Fund	Budget Entity
21000	TEST_SPD_1	No	No	Multiple Line	09/01/2023	Active	Test SpeedKey	2	AP/PO	1	50	21000000	104000	00004	21100100
21000	TEST_SPD_1	No	No	Multiple Line	09/01/2023	Active	Test SpeedKey	2	AP/PO	2	50	21000000	304000	20030	21100100
21000	TEST_SPD_2	Yes	Yes	Single Line	09/01/2023	Active	Test SpeedKey	1	All	1	100	21000000	104000	00003	21100100
21000	TEST_SPD_3	No	No	Multiple Line	09/11/2023	Active	Test SpeedKey	2	AP/PO	1	60	21000000	104000	00005	21100100
21000	TEST_SPD_3	No	No	Multiple Line	09/11/2023	Active	Test SpeedKey	2	AP/PO	2	40	21000000	304000	00006	21100100
21000	TEST_SPD_4	Yes	Yes	Single Line	09/01/2023	Inactive	Test SpeedKey	1	All	1	100	21000000	104000	00008	21100100

Category	Date Program	Grant	Contract	OA1	OA2	Business U	Project	Activity	PC Source Type	PC Category	PC Subcategory	System Source	Create DateTime	Created By	Last Update DateTime	Last Updated By
001000												Online	05-OCT-23 02.39	SUPRIYA.VADDI	05-OCT-23 02.39.17	SUPRIYA.VADDI
000100												Online	05-OCT-23 02.39	SUPRIYA.VADDI	05-OCT-23 02.39.17	SUPRIYA.VADDI
001000												Interface	01-OCT-23 04.39	SUPRIYA.VADDI	01-OCT-23 04.39.17	SUPRIYA.VADDI
000100												Spreadsheet	05-OCT-23 06.30	SUPRIYA.VADDI	05-OCT-23 06.30.17	SUPRIYA.VADDI
000100												Spreadsheet	05-OCT-23 06.30	SUPRIYA.VADDI	05-OCT-23 06.30.17	SUPRIYA.VADDI
001000												Interface	01-OCT-23 08.30	SUPRIYA.VADDI	05-OCT-23 12.30.17	SUPRIYA.VADDI

SpeedKey Overview



Questions?

CREATING YOUR AGENCY'S SPEEDKEY DECISION TREES



DFS SPEEDKEY APPROACH



SpeedKey Overview

SpeedKey Configuration Workbook

- ▶ Current RW Task 541-C due September 27
 - Complete the SpeedKey Configuration Workbook, establishing the **required** SpeedKey(s) (i.e., Payroll, PCard), and any other **optional** SpeedKey configuration values needed by the agency
- ▶ Before completing the workbook, you must first develop your approach for using SpeedKeys. Consider the following:
 - Will you use SpeedKeys beyond the required Payroll and PCard SpeedKeys?
 - What will your agency policies be regarding the use of SpeedKeys (e.g., when to use, when is use optional, when is use required)?
 - How should you plan for a meaningful naming convention?
 - How will you develop and maintain SpeedKeys?
 - How will SpeedKeys impact your agency business systems?
 - If you use SpeedKeys, how will you train your end users on the use of SpeedKeys within your agency?



SpeedKey Overview

SpeedKey Configuration Workbook

Configuration Needed	SetID	SpeedKey	Payroll Indicator	PCard Indicator	Line Type	Description	Sequence Number	Percentage
Agency Indicated	Project Provided	Agency Provided	Agency Indicated	Agency Indicated	Agency Specified	Agency Provided	Agency Provided	Agency Provided
Configuration Needed: "Yes" or "No". - Required Field - Field Type: Character - Field Length: 3	Value used in Florida PALM to define setup data. It allows the sharing of common setup data across business units or specific to business unit. - Required Field - Field Type: Alphanumeric - Field Length: 5	Unique name of the SpeedKey, which will be used by agency transaction processors to populate one or more ChartField values. - Required Field - Field Type: Alphanumeric - Field Length: 10	Specifies whether the SpeedKey is a Payroll or non-Payroll SpeedKey. - Required Field - Field Type: Character - Field Length: 1	Specifies whether the SpeedKey is a PCard or non-PCard SpeedKey. - Required Field - Field Type: Character - Field Length: 1	SpeedKey Line Type: "(S)ingle Line", "(M)ultiple Line". - Required Field - Field Type: Character - Field Length: 1	SpeedKey Description. - Required Field - Field Type: Character - Field Length: 30	Uniquely Identifies a SpeedKey line with a sequence number. - Required Field - Field Type: Numeric - Field Length: 6	Specifies the SpeedKey Line distribution percentages. - Required Field - Field Type: Character - Field Length: 6

Organization	Account	Fund	Budget Entity	Category	State Program	Grant ID	Contract
Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified
Identifies the organizational entity associated with a transaction and tracks information according to a structural breakdown (i.e., division, bureau, section) or operating unit of the organization. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 10	Provides functionality to capture detailed transactional data. Can be specified as a balance sheet account or operating account. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 6	Segregates and captures specific activities or classifies certain objectives in accordance with special regulations, restrictions, or limitations. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 5	Represents organizations and/or functions to which appropriations are made and typically represents a program. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 8	Represents both appropriation categories and revenue source codes. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 6	State Program tracks both revenue and expenditures for programs within or across organizations. State Program values remain unchanged from the Program Component values as established in LAS/PBS. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 10	Grant ID value is used to track financial assistance that provides support or stimulation to accomplish a public purpose. - Optional Field - Field Type: Character - Field Length: 5	Contract ChartField captures expenditure and revenue transactions for two party agreements. - Optional Field - Field Type: Character - Field Length: 10

OA1	OA2	Project	PC Business Unit	Activity ID	PC Source Type	PC Category	PC Subcategory	Comments
Agency Specified	Agency Specified	Agency Provided	Agency Provided	Agency Specified	Agency Provided	Agency Provided	Agency Provided	Agency Provided
Other Accumulator 1 (OA1) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses. - Optional Field - Field Type: Alphanumeric - Field Length: 5	Other Accumulator 2 (OA2) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses. - Optional Field - Field Type: Alphanumeric - Field Length: 10	Project ChartField is used to capture a planned undertaking of something to be accomplished or produced, having a beginning and ending date, for which expenditures/costs and revenues are to be tracked. - Optional Field - Field Type: Character - Field Length: 15	Used to define an organization or organizational subset that is independent with regards to one or more accounting or operational functions for Project related ChartFields. - Required Field (Based on prior column dependency) - Field Type: Numeric - Field Length: 5	Tracks specific tasks that make up a Project and records transactional details; a Project must have at least one associated Activity ID. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 15	The PC Source Type is used to further define a project transaction. - Optional Field - Field Type: Character - Field Length: 5	PC Category can further define source types. - Optional Field - Field Type: Character - Field Length: 5	PC Subcategory can further define source types. - Optional Field - Field Type: Character - Field Length: 5	Agency Comments - Optional Field - Field Type: Character - Field Length: 254



SpeedKey Overview

SpeedKey Configuration Workbook

Configuration Needed	SetID	SpeedKey	Payroll Indicator	PCard Indicator	Line Type	Description	Sequence Number	Percentage
Agency Indicated	Project Provided	Agency Provided	Agency Indicated	Agency Indicated	Agency Specified	Agency Provided	Agency Provided	Agency Provided
<p>Configuration Needed: "Yes" or "No".</p> <ul style="list-style-type: none"> - Required Field - Field Type: Character - Field Length: 3 	<p>Value used in Florida PALM to define setup data. It allows the sharing of common setup data across business units or specific to business unit.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Alphanumeric - Field Length: 5 	<p>Unique name of the SpeedKey, which will be used by agency transaction processors to populate one or more ChartField values.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Alphanumeric - Field Length: 10 	<p>Specifies whether the SpeedKey is a Payroll or non-Payroll SpeedKey.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Character - Field Length: 1 	<p>Specifies whether the SpeedKey is a PCard or non-PCard SpeedKey.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Character - Field Length: 1 	<p>SpeedKey Line Type: "(S)ingle Line", "(M)ultiple Line".</p> <ul style="list-style-type: none"> - Required Field - Field Type: Character - Field Length: 1 	<p>SpeedKey Description.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Character - Field Length: 30 	<p>Uniquely Identifies a SpeedKey line with a sequence number.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Numeric - Field Length: 6 	<p>Specifies the SpeedKey Line distribution percentages.</p> <ul style="list-style-type: none"> - Required Field - Field Type: Character - Field Length: 6
	<p>entity associated with a transaction and tracks information according to a structural breakdown (i.e., division, bureau, section) or operating unit of the organization.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 10 	<p>capture detailed transactional data. Can be specified as a balance sheet account or operating account.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 6 	<p>specific activities or classifies certain objectives in accordance with special regulations, restrictions, or limitations.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 5 	<p>and/or functions to which appropriations are made and typically represents a program.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 8 	<p>appropriation categories and revenue source codes.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 6 	<p>revenue and expenditures for programs within or across organizations. State Program values remain unchanged from the Program Component values as established in LAS/PBS.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 10 	<p>track financial assistance that provides support or stimulation to accomplish a public purpose.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 5 	<p>captures expenditure and revenue transactions for two party agreements.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 10

OA1	OA2	Project	PC Business Unit	Activity ID	PC Source Type	PC Category	PC Subcategory	Comments
Agency Specified	Agency Specified	Agency Provided	Agency Provided	Agency Specified	Agency Provided	Agency Provided	Agency Provided	Agency Provided
<p>Other Accumulator 1 (OA1) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Alphanumeric - Field Length: 5 	<p>Other Accumulator 2 (OA2) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Alphanumeric - Field Length: 10 	<p>Project ChartField is used to capture a planned undertaking of something to be accomplished or produced, having a beginning and ending date, for which expenditures/costs and revenues are to be tracked.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 15 	<p>Used to define an organization or organizational subset that is independent with regards to one or more accounting or operational functions for Project related ChartFields.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Numeric - Field Length: 5 	<p>Tracks specific tasks that make up a Project and records transactional details; a Project must have at least one associated Activity ID.</p> <ul style="list-style-type: none"> - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 15 	<p>The PC Source Type is used to further define a project transaction.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 5 	<p>PC Category can further define source types.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 5 	<p>PC Subcategory can further define source types.</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 5 	<p>Agency Comments</p> <ul style="list-style-type: none"> - Optional Field - Field Type: Character - Field Length: 254



SpeedKey Overview

SpeedKey Configuration Workbook

Configuration Needed	SetID	SpeedKey	Payroll Indicator	PCard Indicator	Line Type	Description	Sequence Number	Percentage
Agency Indicated	Project Provided	Agency Provided	Agency Indicated	Agency Indicated	Agency Specified	Agency Provided	Agency Provided	Agency Provided
Configuration Needed: "Yes" or "No". - Required Field - Field Type: Character - Field Length: 1	Value used in Florida PALM to define setup data. It allows the sharing of common setup data across business units or specific to	Unique name of the SpeedKey, which will be used by agency transaction processors to populate one or more ChartField values.	Specifies whether the SpeedKey is a Payroll or non-Payroll SpeedKey.	Specifies whether the SpeedKey is a PCard or non-PCard SpeedKey. - Required Field	SpeedKey Line Type: "(S)ingle Line", "(M)ultiple Line". - Required Field	SpeedKey Description. - Required Field - Field Type: Character - Field Length: 30	Uniquely Identifies a SpeedKey line with a sequence number. - Required Field	Specifies the SpeedKey Line distribution percentages.

Organization	Account	Fund	Budget Entity	Category	State Program	Grant ID	Contract
Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified
Identifies the organizational entity associated with a transaction and tracks information according to a structural breakdown (i.e., division, bureau, section) or operating unit of the organization. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 10	Provides functionality to capture detailed transactional data. Can be specified as a balance sheet account or operating account. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 6	Segregates and captures specific activities or classifies certain objectives in accordance with special regulations, restrictions, or limitations. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 5	Represents organizations and/or functions to which appropriations are made and typically represents a program. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 8	Represents both appropriation categories and revenue source codes. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 6	State Program tracks both revenue and expenditures for programs within or across organizations. State Program values remain unchanged from the Program Component values as established in LAS/PBS. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 10	Grant ID value is used to track financial assistance that provides support or stimulation to accomplish a public purpose. - Optional Field - Field Type: Character - Field Length: 5	Contract ChartField captures expenditure and revenue transactions for two party agreements. - Optional Field - Field Type: Character - Field Length: 10

OA1	OA2	Project	PC Business Unit	Activity ID	PC Source Type	PC Category	PC Subcategory	Comments
Agency Specified	Agency Specified	Agency Provided	Agency Provided	Agency Specified	Agency Provided	Agency Provided	Agency Provided	Agency Provided
Other Accumulator 1 (OA1) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses. - Optional Field - Field Type: Alphanumeric - Field Length: 5	Other Accumulator 2 (OA2) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses. - Optional Field - Field Type: Alphanumeric - Field Length: 10	Project ChartField is used to capture a planned undertaking of something to be accomplished or produced, having a beginning and ending date, for which expenditures/costs and revenues are to be tracked. - Optional Field - Field Type: Character - Field Length: 15	Used to define an organization or organizational subset that is independent with regards to one or more accounting or operational functions for Project related ChartFields. - Required Field (Based on prior column dependency) - Field Type: Numeric - Field Length: 5	Tracks specific tasks that make up a Project and records transactional details; a Project must have at least one associated Activity ID. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 15	The PC Source Type is used to further define a project transaction. - Optional Field - Field Type: Character - Field Length: 5	PC Category can further define source types. - Optional Field - Field Type: Character - Field Length: 5	PC Subcategory can further define source types. - Optional Field - Field Type: Character - Field Length: 5	Agency Comments - Optional Field - Field Type: Character - Field Length: 254



SpeedKey Overview

SpeedKey Configuration Workbook

Configuration Needed	SetID	SpeedKey	Payroll Indicator	PCard Indicator	Line Type	Description	Sequence Number	Percentage
Agency Indicated	Project Provided	Agency Provided	Agency Indicated	Agency Indicated	Agency Specified	Agency Provided	Agency Provided	Agency Provided
Configuration Needed: "Yes" or "No". - Required Field - Field Type: Character - Field Length: 3	Value used in Florida PALM to define setup data. It allows the sharing of common setup data across business units or specific to business unit. - Required Field - Field Type: Alphanumeric - Field Length: 5	Unique name of the SpeedKey, which will be used by agency transaction processors to populate one or more ChartField values. - Required Field - Field Type: Alphanumeric - Field Length: 10	Specifies whether the SpeedKey is a Payroll or non-Payroll SpeedKey. - Required Field - Field Type: Character - Field Length: 1	Specifies whether the SpeedKey is a PCard or non-PCard SpeedKey. - Required Field - Field Type: Character - Field Length: 1	SpeedKey Line Type: "(S)ingle Line", "(M)ultiple Line". - Required Field - Field Type: Character - Field Length: 1	SpeedKey Description. - Required Field - Field Type: Character - Field Length: 30	Uniquely Identifies a SpeedKey line with a sequence number. - Required Field - Field Type: Numeric - Field Length: 6	Specifies the SpeedKey Line distribution percentages. - Required Field - Field Type: Character - Field Length: 6

Organization	Account	Fund	Budget Entity	Category	State Program	Grant ID	Contract
Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified	Agency Specified
Identifies the organizational entity associated with a transaction and tracks information according to a	Provides functionality to capture detailed transactional data. Can be specified as a balance	Segregates and captures specific activities or classifies certain objectives in accordance with special	Represents organizations and/or functions to which appropriations are made and typically represents a	Represents both appropriation categories and revenue source codes.	State Program tracks both revenue and expenditures for programs within or across organizations. State Program	Grant ID value is used to track financial assistance that provides support or stimulation to accomplish a	Contract ChartField captures expenditure and revenue transactions for two party agreements.

OA1	OA2	Project	PC Business Unit	Activity ID	PC Source Type	PC Category	PC Subcategory	Comments
Agency Specified	Agency Specified	Agency Provided	Agency Provided	Agency Specified	Agency Provided	Agency Provided	Agency Provided	Agency Provided
Other Accumulator 1 (OA1) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses. - Optional Field - Field Type: Alphanumeric - Field Length: 5	Other Accumulator 2 (OA2) is used to track optional agency reporting needs including cost pools, expenditures, revenues, or other specific uses. - Optional Field - Field Type: Alphanumeric - Field Length: 10	Project ChartField is used to capture a planned undertaking of something to be accomplished or produced, having a beginning and ending date, for which expenditures/costs and revenues are to be tracked. - Optional Field - Field Type: Character - Field Length: 15	Used to define an organization or organizational subset that is independent with regards to one or more accounting or operational functions for Project related ChartFields. - Required Field (Based on prior column dependency) - Field Type: Numeric - Field Length: 5	Tracks specific tasks that make up a Project and records transactional details; a Project must have at least one associated Activity ID. - Required Field (Based on prior column dependency) - Field Type: Character - Field Length: 15	The PC Source Type is used to further define a project transaction. - Optional Field - Field Type: Character - Field Length: 5	PC Category can further define source types. - Optional Field - Field Type: Character - Field Length: 5	PC Subcategory can further define source types. - Optional Field - Field Type: Character - Field Length: 5	Agency Comments - Optional Field - Field Type: Character - Field Length: 254



SpeedKey Overview

SpeedKey Configuration Workbook

- ▶ Supporting Materials and Resources:
 - [RW 541 Agency Configuration Workbooks Supplemental](#)
 - [Chart of Accounts Design](#)
 - [Payroll Management Website](#)
 - [Knowledge Center - SpeedKey Overview](#)



SpeedKey Overview



Questions?

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