

## Establishing SpeedTypes Job Aid

User Role: Agency COA Maintainer  
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### Overview

Agencies have the option to set up shortcut keys, called SpeedTypes, to efficiently and accurately populate ChartField values on disinvestment journals in the General Ledger of Florida PALM. If necessary, ChartField values may subsequently be edited on the journal line prior to processing. Using SpeedTypes will reduce and simplify data entry when creating disinvestment journals.

Disinvestment journals consist of a minimum of four lines, as shown in Figure 1. Two of the lines represent the agency's disinvestment account and offset cash account respectively. Agencies using SpeedTypes will establish an agency unique SpeedType for each agency related disinvestment journal line (i.e., set up two SpeedTypes) to populate the corresponding ChartField values. The final two lines represent the Treasury Pool 1 liability account (SpeedType = TRPOOL1LIA) and Treasury offset InterUnit cash account (SpeedType = TRIUCASH). Agencies may use these enterprise wide SpeedTypes to populate the corresponding ChartField values.

Select	Line	*Unit	*Ledger	Speed Type	Account	Fund	Budget Entity	Category	Base Amount
<input type="checkbox"/>	1	37000	ACTUALS	DISINVCN	104001	00070	37010100	002000	-100,000.000
<input type="checkbox"/>	2	37000	ACTUALS	DISOFFSET	101013	00068	37010100	002000	100,000.000
<input type="checkbox"/>	3	43002	ACTUALS	TRPOOL1LIA	304001	72800	43100300	315010	100,000.000
<input type="checkbox"/>	4	43002	ACTUALS	TRIUCASH	101013	72800	43100300	315010	-100,000.000

Figure 1: Example disinvestment journal using SpeedTypes

Once a SpeedType is entered on a journal line, the SpeedType used will only remain visible in the field while an end user is still on the page. End users are not able to view SpeedTypes entered on journals after exiting the journal page or once the journal is edited. To view SpeedTypes used on an existing journal, the agency may create a query from the JRNL\_LN table to view the SpeedType referenced to populate the ChartFields on the respective journal line for historical reference.

## Guiding Principles on Establishing SpeedTypes

The following provides general guiding principles that are recommended to follow when establishing SpeedTypes:

- SpeedType Naming Convention
  - SpeedType keys may be up to 10 characters in length.
  - A description that is 30 characters in length may be used to clarify the SpeedType's intended use.
  - SpeedType keys must be a unique value (i.e., may not be duplicated).
  - It is recommended that SpeedType keys follow a standard naming convention to assist end users in searching for the SpeedType(s) established for their use.
    - For example, the first two or three characters can represent the division within the agency, or other meaningful categorization, to identify for end users which SpeedTypes have been established for their use. The remaining characters may be defined to correlate to the type of disinvestment or Fund that is further meaningful to the end user.
  - It is not recommended that SpeedType keys be defined to reference an end user name or personal information.
- Sharing SpeedTypes Across End Users
  - To limit the creation of numerous SpeedTypes and for the ease of maintenance, it is recommended that SpeedTypes be established as "Universal", signifying any end user within the agency can use the SpeedType.
    - Leveraging a standardized naming convention encourages end users to only search for/use those SpeedTypes established with the applicable name for their division or other applicable categorization identified for the intended end users.
  - It is not recommended the "One User" option be used to establish SpeedTypes for use by a single end user as this leads to the creation of numerous SpeedTypes and increased maintenance.
  - The "Primary Permission List" option is delivered with the Florida PALM system, however, **should not be used**. SpeedTypes created using this option **will not** be available for use by the intended end users.
- Establishing SpeedTypes
  - It is not recommended that SpeedTypes be established for every possible ChartField combination that may be used on a journal, as this leads to the creation of numerous SpeedTypes and increased maintenance.
    - If a particular ChartField value is dynamic and subject to regularly change, the SpeedType may be created to only populate the ChartField values that remain the same. This allows an end user to manually enter the dynamic

ChartField as appropriate after using a SpeedType to populate the other ChartField values.

- It is not recommended to create a one-for-one SpeedType key for every end user as this leads to the creation of numerous SpeedTypes and increased maintenance.

### How to Establish an Agency SpeedType

The Agency COA Maintainer is responsible for creating and maintaining their agency's SpeedTypes. SpeedTypes may be established for use by all agency end users within their respective Business Unit to use when creating a disinvestment journal. Alternatively, a SpeedType may also be established for use by a single end user (i.e., defining a User ID); however, this is not recommended by Florida PALM. Florida PALM recommends that agencies establish a standardized SpeedType alpha/numeric naming convention for ease of reference by journal creators. **Note:** It is important that agencies use and communicate their SpeedType naming convention to help journal creators search for and select the correct SpeedType (e.g., include the applicable agency division acronym and/or include where it is for the debit or credit line).

1. Navigate to the **SpeedType** page.
  - a. Path: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > SpeedTypes
2. Click on the **Add a New Value** tab.
3. Enter the **SetID** value as your Business Unit.
4. Enter a SpeedType name using your agency's naming convention in the **SpeedType Key** field.
5. Click the **Add** button.

Figure 2: Adding a new SpeedType

6. Enter a description of the SpeedType in the **Description** field.
7. Enter the ChartField values that reflect the respective disinvestment or cash line on a disinvestment journal. You may enter values for full (recommended) or partial combinations of the following applicable ChartFields:
  - a. **Account**
  - b. **Fund**
  - c. **Budget Entity**
  - d. **Category**

- Click the **Save** button.

**SpeedType NOTES:**

- The **Description** has a 30 character limit
- For CMS Wave, only four ChartFields are used
- Values may be entered for all (recommended) or a subset of ChartField combinations
- SpeedTypes are available for use immediately after they are created

Figure 3: Defining SpeedType ChartField values

## How to Update SpeedTypes

Agency COA Maintainers may update the ChartField values on an existing SpeedType.

- Navigate to the **SpeedType** page.
  - Path: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > SpeedTypes
- Click on the **Find an Existing Value** tab.
- Enter the **SetID** with your agency Business Unit.
- Enter the **SpeedType Key** to be updated or leave the field blank to select from a list of established SpeedTypes.
- Select the **Type of SpeedType** from the dropdown menu.
  - Universal – SpeedTypes available to all agency end users.
  - One User – SpeedTypes available to one agency end user.
- Click the **Search** button.

**SpeedTypes**  
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

\*SetID = 37000

Speed Type Key begins with

User ID begins with

Primary Permission List begins with

\*Type of SpeedType = Universal (All Users)

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

**SpeedType NOTES:**

- View the SpeedType report to see a list of your agency's available SpeedTypes

Figure 4: How to search for existing SpeedTypes

7. In the Search Results, click on the desired **SpeedType** hyperlink to edit.

Search Results

View All | First | 1-2 of 2 | Last

SetID	Speed Type Key	User ID	Primary Permission List	Type of Speed Type
37000	DISINVCR	(blank)	(blank)	Universal
37000	DISOFFSET	(blank)	(blank)	Universal

Find an Existing Value | Add a New Value

Figure 5: How to select an existing SpeedType to update or delete

8. Edit the applicable ChartField value(s).
9. Click the **Save** button.

**SpeedType**

SetID 37000  
 SpeedType Key DISINVC  
 Type of SpeedType Universal (All Users)  
 Description DEP Disinvest line (Credit)

Organization  
 Account 104001 POOL 1 DISINV - TREASURY  
 Fund 00070 DEP GR  
 Budget Entity 37010100 EXEC DIRECTION & SUPP SVCS  
 Category 002000 SALE OF INVESTMENTS

State Program  
 PC Business Unit  
 Project  
 Activity  
 PC Source Type  
 PC Category  
 PC Subcategory  
 Contract  
 Other Accumulator 1  
 Other Accumulator 2

**SpeedType NOTES:**

- Updating a SpeedType will not impact existing disinvestment journals
- Disinvestment journals created with the updated SpeedType will populate the new ChartField values
- Click the **trash can** icon to delete a single SpeedType

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Figure 6: How to update or delete a SpeedType

## How To Mass Delete SpeedTypes

Agency COA Maintainers may use the Mass Delete function to delete multiple SpeedTypes that are no longer needed at one time.

1. Navigate to the **SpeedType Delete** page.
  - a. Path: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > Mass Delete SpeedTypes
2. Enter the **SetID** with your agency Business Unit.
3. Select the **Type of SpeedType** from the dropdown menu (e.g., Universal (All Users)).
4. Click the **Search** button.



Figure 7: How to search for SpeedTypes to mass delete

5. Select the checkbox(es) next to the applicable SpeedType(s) for deletion
6. Click the **Delete** hyperlink.
7. Click the **Save** button when complete.

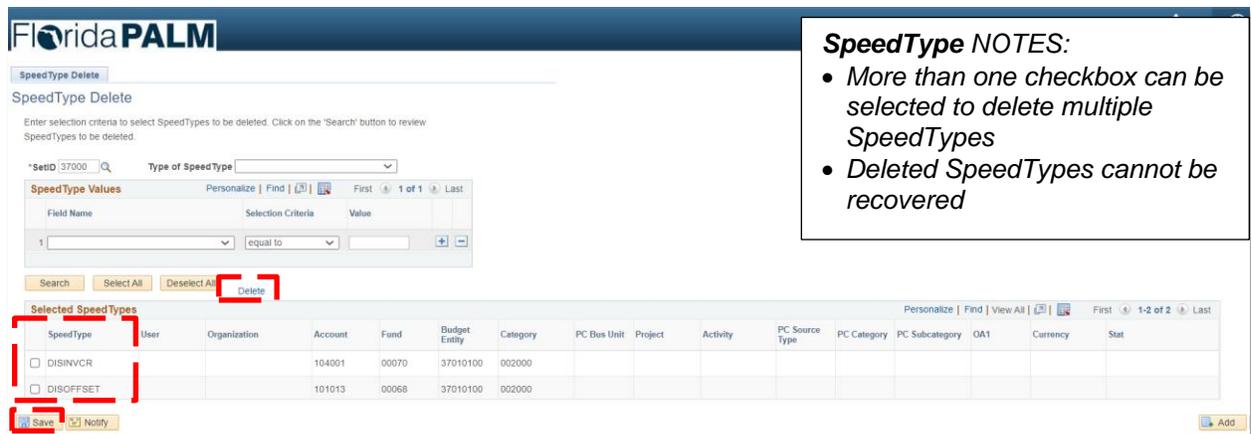


Figure 8: How to mass delete SpeedTypes

### How to View Available SpeedTypes

Agency COA Maintainers and GL Reporters may run a report to view the SpeedTypes for their agency.

1. Navigate to the **SpeedTypes** page
  - a. Path: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Reports > SpeedTypes
2. Click on the **Add New Value** tab.
3. Create a new Run Control ID in the **Run Control ID** field.
  - a. Use an existing Run Control ID if available.
4. Click the **Add** button.



Figure 9: SpeedType report run control Add page

5. Enter your agency's Business Unit in the **SetID** field.
6. Click the **Run** button.

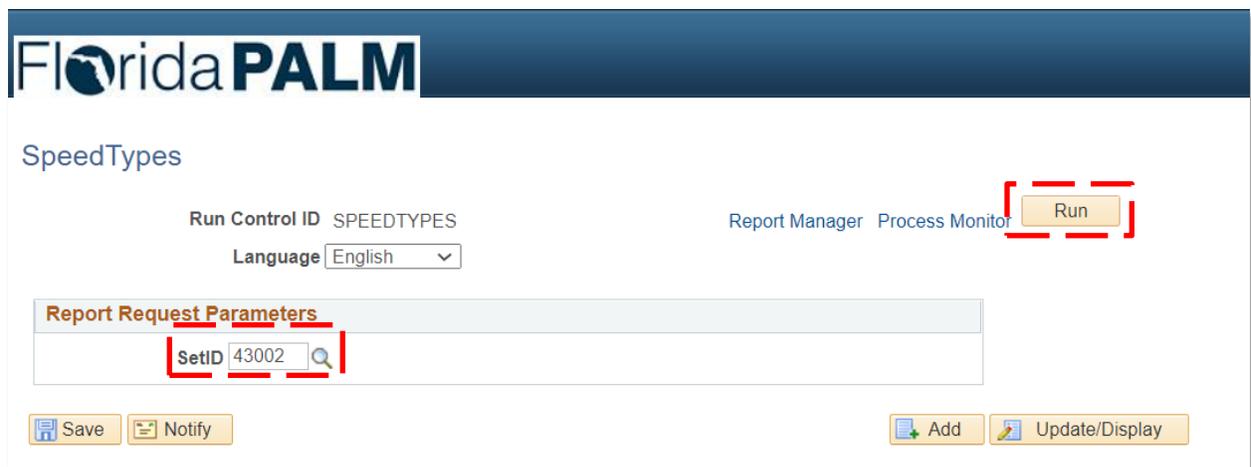


Figure 10: SpeedTypes report run control parameters

7. Click the **OK** button to run the report from the Process Scheduler Request page.

Process Scheduler Request

User ID \_\_\_\_\_ Run Control ID SPEEDTYPES

Server Name  Run Date 01/14/2022

Recurrence  Run Time 5:29:44AM

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	XMLP: List of Valid SpeedTypes	FSX0007	BI Publisher	Web	PDF	Distribution

Figure 11: SpeedTypes report run page

8. Click the **Process Monitor** hyperlink.

FloridaPALM

SpeedTypes

Run Control ID SPEEDTYPES

Language English

Report Manager **Process Monitor**

Process Instance:590530

**Report Request Parameters**

SetID 43002

Figure 12: How to view the SpeedTypes report run status from the Process Monitor page

9. Click the **Refresh** button to update the run status.
10. Once the **Run Status** is 'Success' and the **Distribution Status** is 'Posted', click on the **Report Manager** hyperlink.

**View Process Request For**

User ID:  Type:  Last  1 Days

Server:  Name:  Instance From:  Instance To:  **Report Manager**

Run Status:  Distribution Status:   Save On Refresh

**Process List** Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	590530		BI Publisher	FSX0007	STACEY.TERRY	01/14/2022 5:36:37AM PST	Success	Posted	Details

Figure 13: SpeedTypes report Run Status

11. Click on the **Administration** tab.
12. In the **Description** column, click the .pdf link to view the SpeedType report named **FSX0007.pdf**.

**Administration**

**View Report For**

User ID: STACEY.TERRY Type:  Last  1 Days

Status:  Folder:  Instance:  to:

**Report List** Personalize | Find | View All | First 1 of 1 Last

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	426169	590530	FSX0007 - FSX0007.pdf	01/14/2022 5:36:50AM	Acrobat (*.pdf)	Posted	Details

Figure 14: How to view the SpeedType report

13. View the report.

**ORACLE** PeopleSoft Financials Page: 1 of 1  
 Report Definition: FSX0007 **SpeedTypes** Run Date: 1/14/22  
Run Time: 5:36:48 AM

**Set ID:** 43002

	Account	Budget Entity	Fund	Category
TRIUCASH Treasury InterUnit Cash Type: Universal Operator ID: ---- Operator Class: ----	101013	43100300	72800	315010
TRPOOL1LIA Treasury Pool 1 Liability Type: Universal Operator ID: ---- Operator Class: ----	304001	43100300	72800	315010

Private and Confidential

Figure 15: Example SpeedType report

**Still have questions?**  
 Please contact the [Florida PALM Solution Center](#).