Establishing SpeedTypes Job Aid
User Role: *Agency COA Maintainer*
Last Updated: *03/09/2023*

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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.
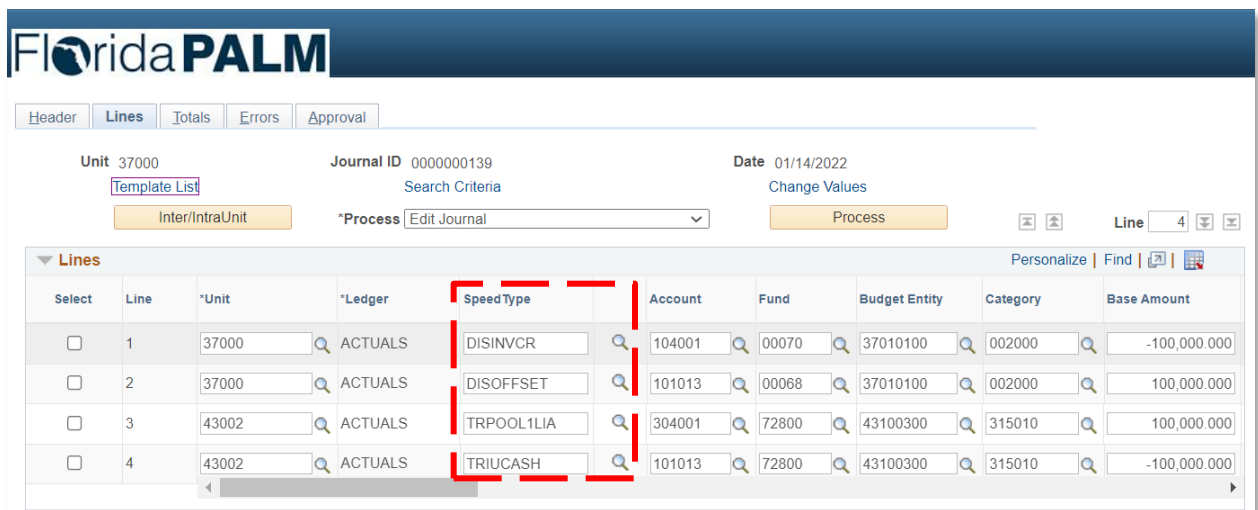

Figure 1: Example disinvestment journal using SpeedTypes

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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from the JRNL_LN table to view the SpeedType referenced to populate the ChartFields on the respective journal line for historical reference.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.

o 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

> **SpeedType** *NOTES:*
> - A **SpeedType Key** *has a 10-character limit and must be a unique value*
> - *Use your agency's standard when creating new* **SpeedType Keys**
> - *The User ID field may be used to limit the use of the SpeedType to a specific User (not recommended)*
> - *Do not use the* **Primary Permission List** *field*

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**

8. Click the **Save** button.

Figure 3: Defining SpeedType ChartField values

How to Update SpeedTypes

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

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 **Find an Existing Value** tab.
3. Enter the **SetID** with your agency Business Unit.
4. Enter the **SpeedType Key** to be updated or leave the field blank to select from a list of established SpeedTypes.
5. Select the **Type of SpeedType** from the dropdown menu.
    a. Universal – SpeedTypes available to all agency end users.
    b. One User – SpeedTypes available to one agency end user.
6. Click the **Search** button.

Figure 4: How to search for existing SpeedTypes

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

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

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

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.
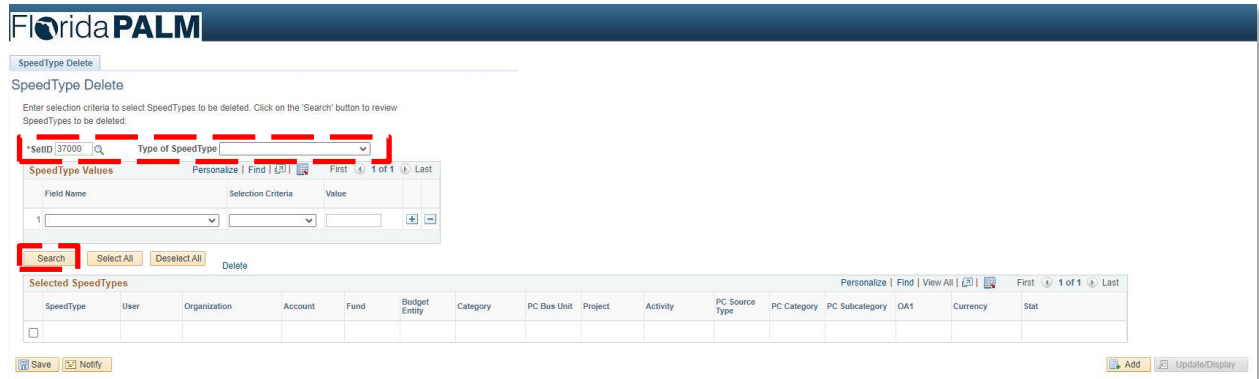
Figure 7: How to search for SpeedTypes to mass delete

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.

> *SpeedType NOTES:*
> - *More than one checkbox can be selected to delete multiple SpeedTypes*
> - *Deleted SpeedTypes cannot be recovered*
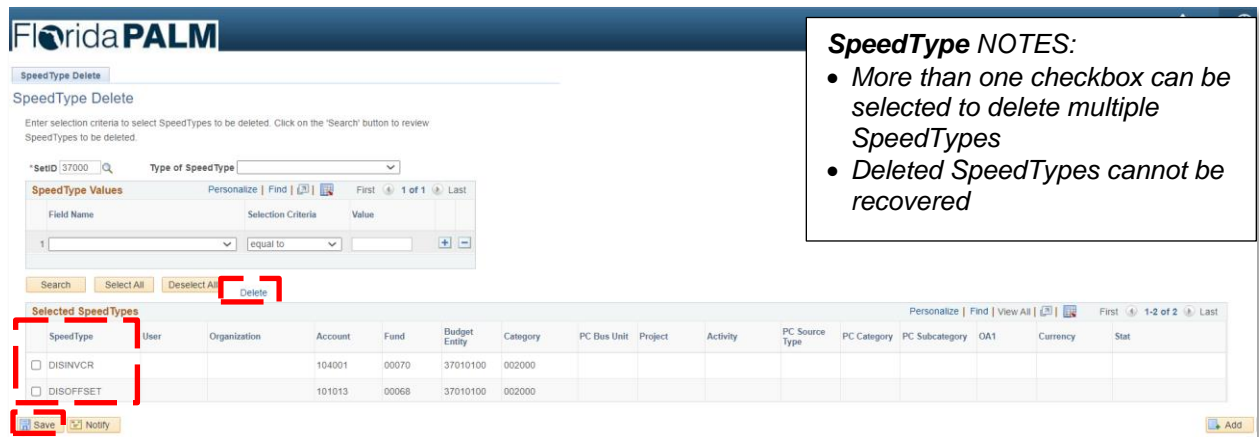
Figure 8: How to mass delete SpeedTypes

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.
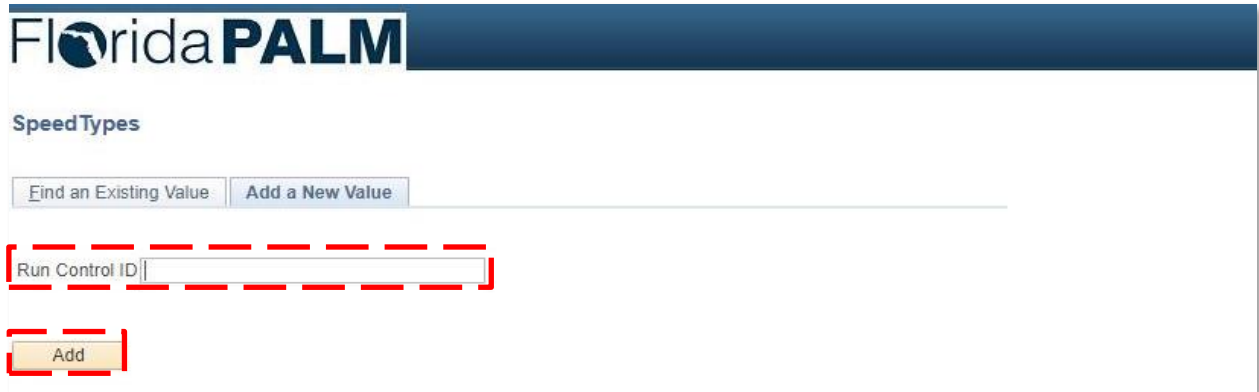
Figure 9: SpeedType report run control Add page

5. Enter your agency's Business Unit in the **SetID** field.
6. Click the **Run** button.
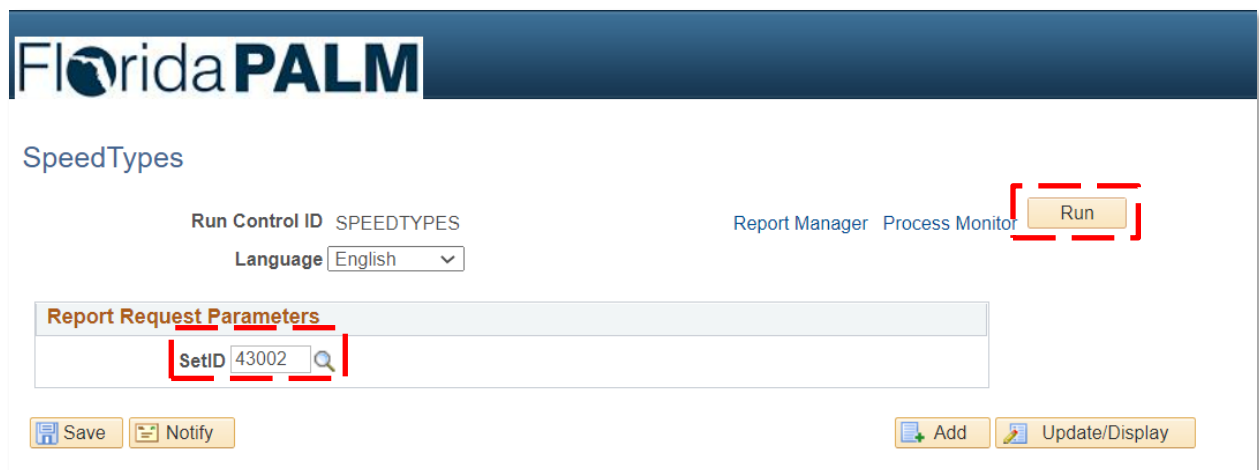
Figure 10: SpeedTypes report run control parameters

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

Figure 11: SpeedTypes report run page

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

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.

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**.

Figure 14: How to view the SpeedType report

13. View the report.

Figure 15: Example SpeedType report

Still have questions?
Please contact the **Florida PALM Solution Center**.