
PO.020.290 – ADDING SPEEDCHARTS

Purpose	<ul style="list-style-type: none"> To explain the purpose of a Speedchart. To explain how security can be set up for a Speedchart. To add a Speedchart
Description	Speedcharts allow ChartField combinations to be grouped together which reduces the amount of data entry required for frequently used ChartField combinations.
Security Role	BOR_PO_SETUP_CONFIG
Dependencies/ Constraints	None
Additional Information	Speedcharts are different from Speed types, which allow assignment of a specific code to a single ChartField combination. Speedcharts can be set up with different security; however, they should be created as "universal".

Procedure

Below are step by step instructions on how to create a Speedchart.

Step	Action
1.	Click NavBar icon.
2.	Click the Menu icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Click the Product Related link.
5.	Click the Procurement Options link.
6.	Click the Management link.
7.	Click the SpeedChart link.
8.	Click the Add a New Value tab.
9.	Create a new value for all future use of this SpeedChart in the SpeedChart Key field.
10.	Verify the Effective Date is correct.
11.	Click the Add button.
12.	Enter a short description of the SpeedChart name in the Description field.
13.	Verify the Security Option is set to Universal (All Users).
14.	Verify the Definition is set to Enter Percentages.
15.	Verify the UOM field is blank.
16.	If needed, enter a long description in the second Description field.
17.	Enter the business unit the GL Unit field.
18.	Verify the Account field is blank. The Account field will default on the transaction based on the item's category code.
19.	When creating the new Speedchart, any or all the following fields can be defined depending on how the business unit wants to use the Speedchart: <ul style="list-style-type: none"> • Fund • Department • Program • Class
20.	ITS recommends business units leave the Budget Reference blank on the SpeedChart. If business units do not leave this field blank, they will need to update the budget reference when the fiscal year changes.
21.	Click the Save button.

