

**SpeedTypes/SpeedCharts Overview**

This Job Aid provides an overview of the process to set up SpeedTypes/SpeedCharts in Cardinal.

A SpeedType/SpeedChart is a predefined value that can be entered to auto-populate some ChartField values on the accounting distribution line (such as fund, program, and department). They allow defining codes for frequently used ChartField combinations. When a SpeedType/SpeedChart is entered, users can still add or modify COA values on the associated distribution line.

SpeedTypes can be used in all Cardinal Financial modules except for Vouchers. SpeedTypes are also used in Cardinal HCM modules.

SpeedCharts provide similar functionality only for Vouchers, except that multiple accounting distributions can be configured on an individual SpeedChart.

Please note that if a SpeedType is created, a corresponding SpeedChart must be created as well, and vice versa.

The role of Agency ChartField Administrator (V\_GL\_COVA\_AGENCY\_CF\_ADMIN) has access to maintain Agency controlled ChartFields (Department, Project, Cost Center, Task, Asset, Agency Use 1, Agency Use 2) and maintain SpeedTypes/ SpeedCharts. In order to identify who has the Agency ChartField Administrator role in Cardinal Financial, run the **V\_PT\_SEC\_ROLE\_USERS** query. Role names may be found in the Statewide Security Handbook, and % may be used for Department ID to bring back all departments.

**Navigation Note:** Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.



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**Revision History**

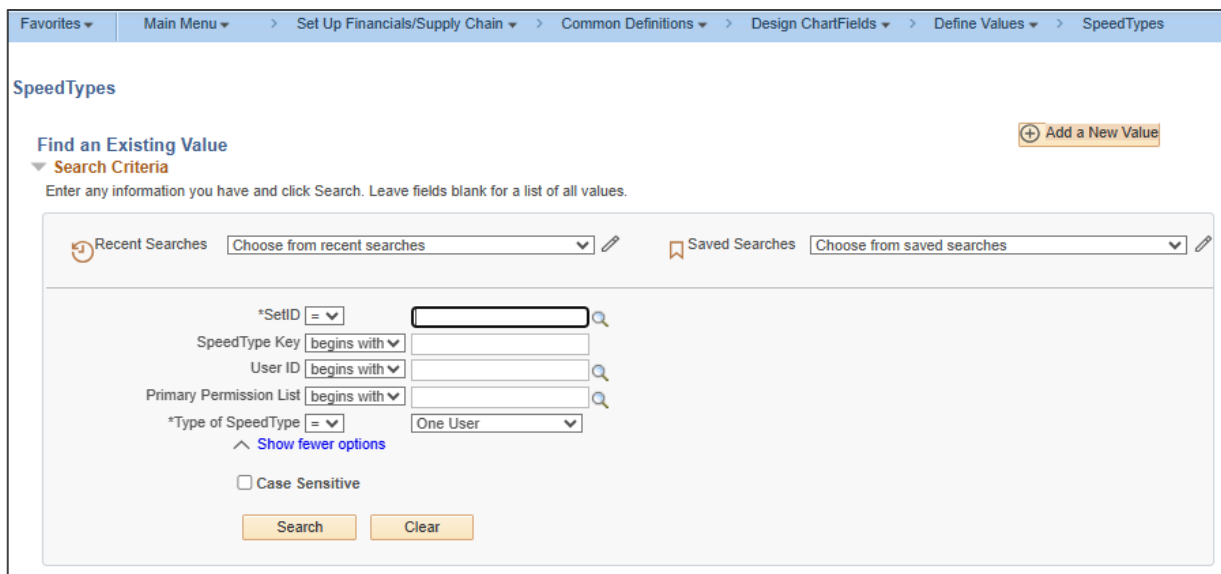
Revision Date	Summary of Changes
05/21/2026	Baseline.


### Creating a SpeedType

Please note that if a **SpeedType** is created, a corresponding **SpeedChart** must be created as well, and vice versa. See the section titled [Creating a SpeedChart](#).

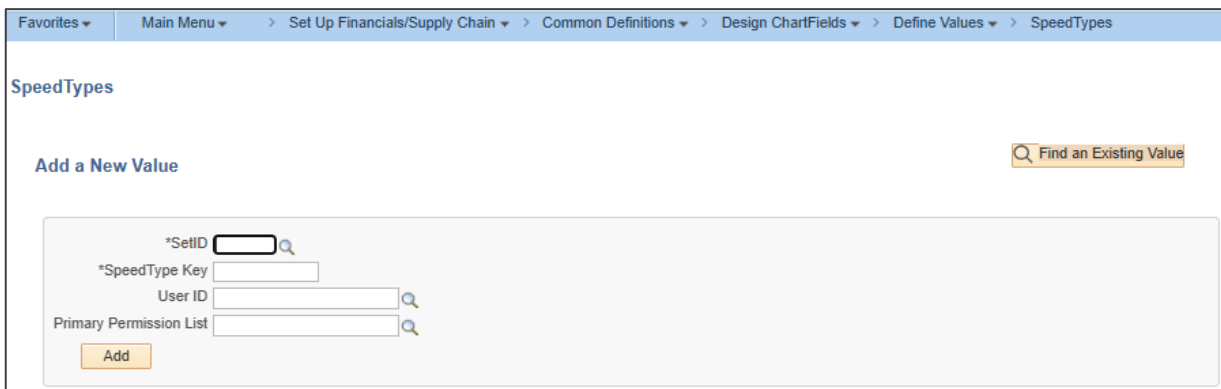
Step	Action
1.	Navigate to the <b>SpeedType</b> page using the following path: <b>Main Menu &gt; Set Up Financials/Supply Chain &gt; Common Definitions &gt; Design ChartFields &gt; Define Values &gt; SpeedTypes</b>

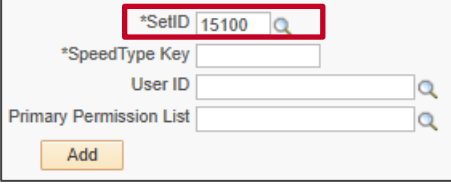

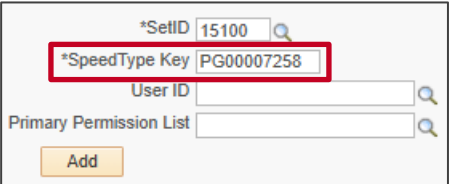



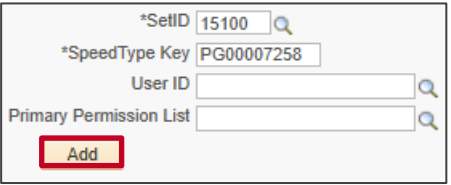
The **SpeedTypes Find an Existing Value Search** page displays.



2.	Click the <b>Add a New Value</b> button. 
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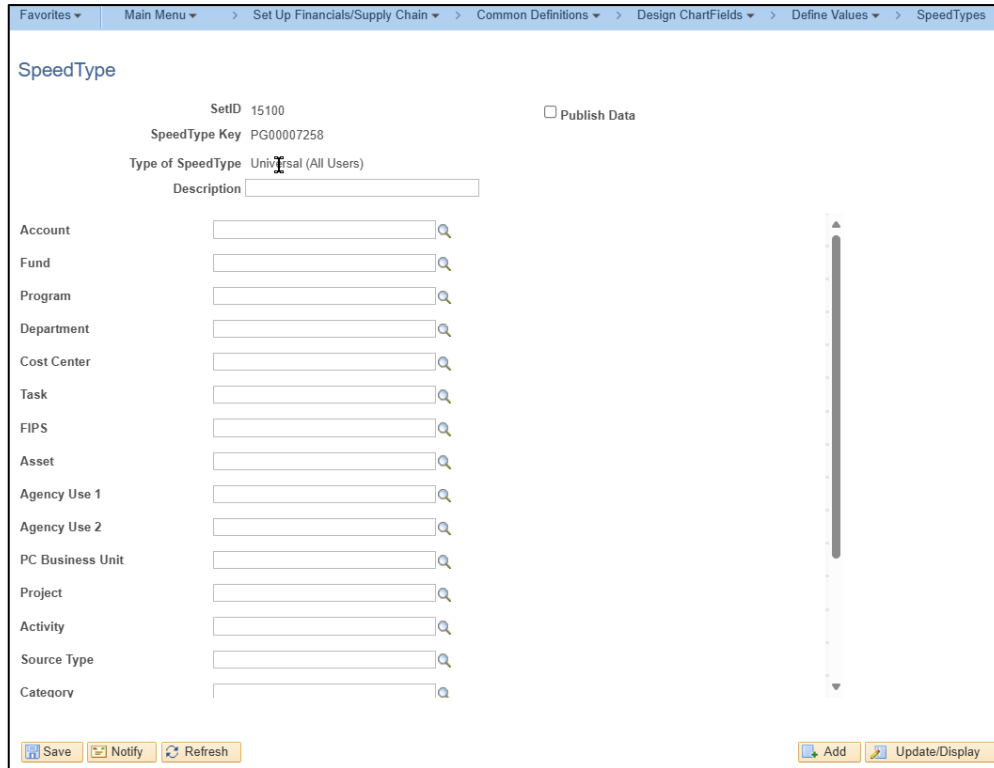
The **SpeedTypes Add a New Value** page displays.



Step	Action
3.	Enter the Agency Business Unit number in the <b>SetID</b> field. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>
	Do not enter STATE in the <b>SetID</b> field. Enter the Agency Business Unit number.
4.	Enter the name to be used for the SpeedType Key. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>
	Consider naming the SpeedType Key using some logic in the name for users to remember more easily. For example, name the SpeedType Key after a project number that is related to a specific grant. In this scenario, "PG00007258" is entered. The <b>SpeedType Key</b> field is up to 10 characters in length.
	The <b>SpeedType Key</b> used should match the corresponding <b>SpeedChart Key</b> for consistency.
	If a <b>User ID</b> or <b>Primary Permission List</b> is listed, only the specified user(s) will have access to the SpeedType. Leave these fields blank, as all SpeedTypes are universally accessible.
5.	Click the <b>Add</b> button. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>

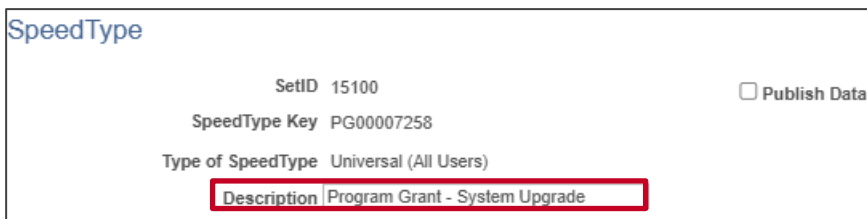
Step	Action
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The **SpeedType** page displays.

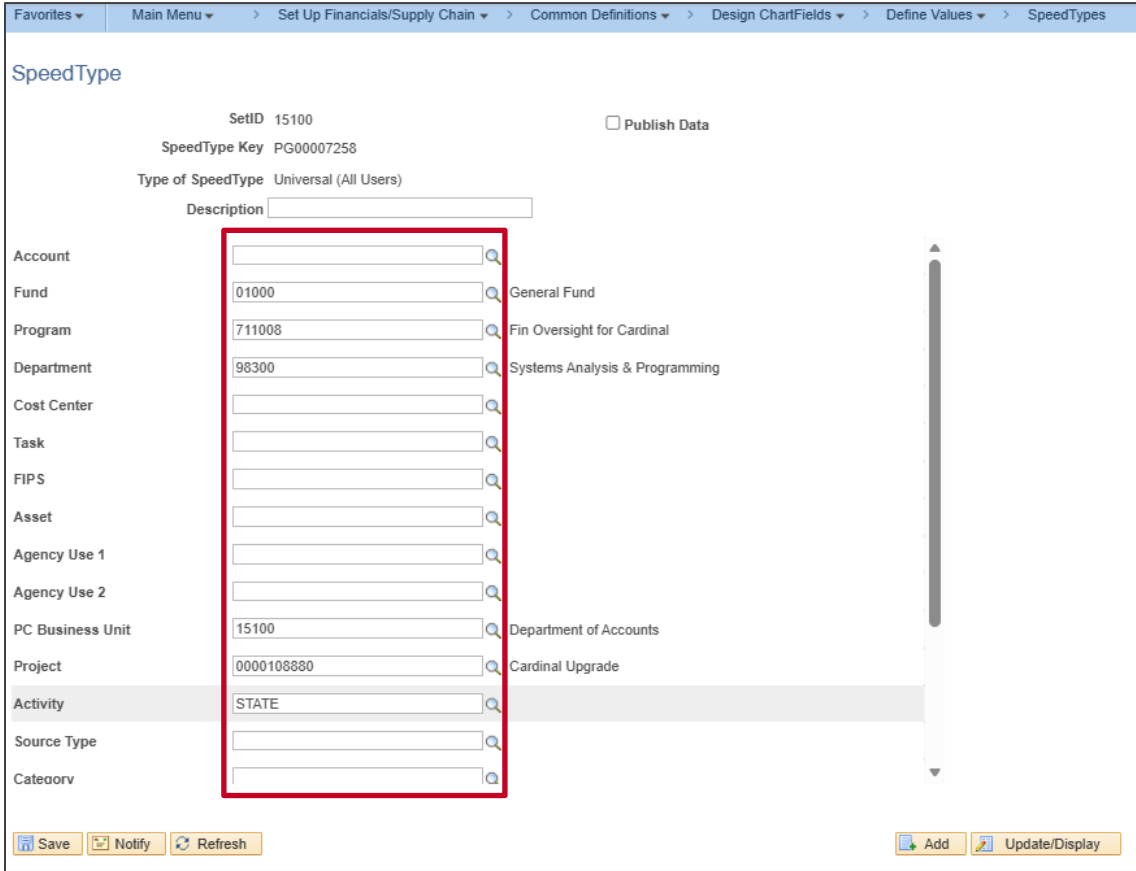






The screenshot shows the 'SpeedType' configuration page. At the top, there is a breadcrumb trail: Favorites > Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > SpeedTypes. The page title is 'SpeedType'. Below the title, the following information is displayed: SetID 15100, SpeedType Key PG00007258, Type of SpeedType Universal (All Users), and a Description field. Below this, there is a list of fields with search icons: Account, Fund, Program, Department, Cost Center, Task, FIPS, Asset, Agency Use 1, Agency Use 2, PC Business Unit, Project, Activity, Source Type, and Category. At the bottom, there are buttons for Save, Notify, Refresh, Add, and Update/Display. A 'Publish Data' checkbox is also present.

6. Enter a description in the **Description** field.



This screenshot is similar to the previous one, but the 'Description' field is highlighted with a red border. The text entered in the field is 'Program Grant - System Upgrade'. The rest of the page content remains the same.

Step	Action
7.	<p>Enter the ChartFields into each of the specific <b>Chartfield</b> fields for this SpeedType.</p> 
	<p>Enter in as many ChartFields needed in order for the SpeedType to be useful. When a SpeedType is selected in a module, users can add, modify or delete ChartFields if changes are needed for that specific transaction.</p>
8.	<p>Select the <b>Publish Data</b> checkbox option. This ensures the SpeedType is sent to the Human Capital Management (HCM) environment.</p> 
9.	<p>Click the <b>Save</b> button.</p> 

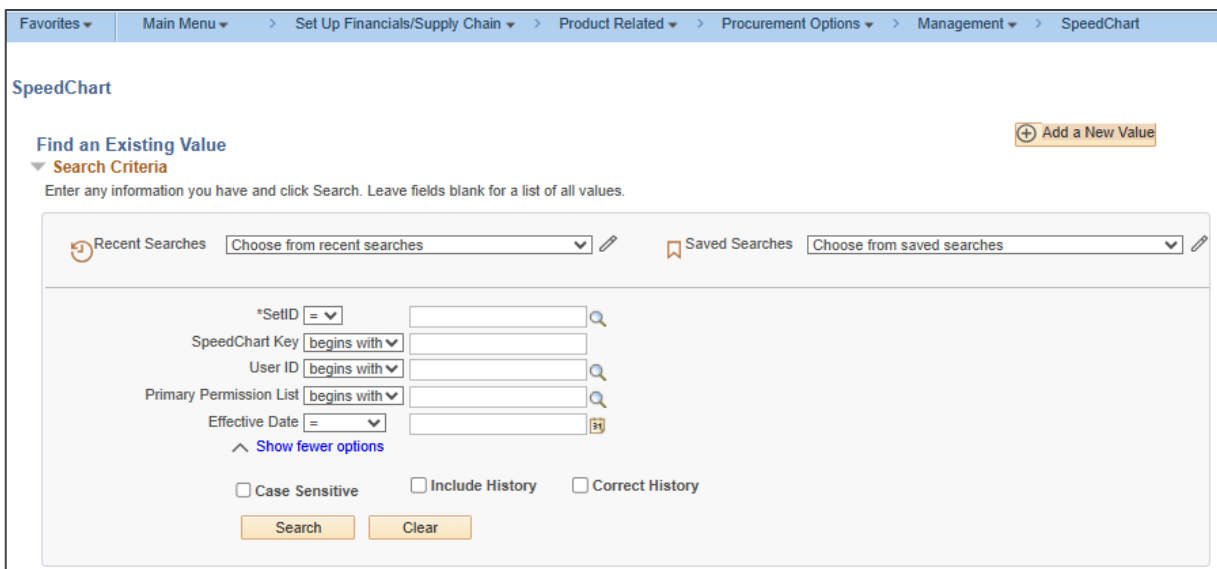
Step	Action
	Updates can be made to existing <b>SpeedTypes</b> . Navigate to the <b>SpeedTypes Find an Existing Value</b> page and enter in the applicable fields to identify the <b>SpeedType</b> that needs to be updated. Update the applicable fields and once all updates have been completed, click the <b>Save</b> button.

### Creating a SpeedChart

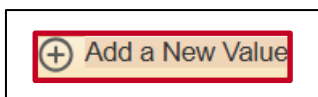
Please note that if a **SpeedChart** is created, a corresponding **SpeedType** must be created as well, and vice versa. See the section titled [Creating a SpeedType](#).

Step	Action
1.	Navigate to the <b>SpeedChart</b> page using the following path: <b>Main Menu &gt; Set Up Financials/Supply Chain &gt; Product Related &gt; Procurement Options &gt; Management &gt; SpeedChart</b>

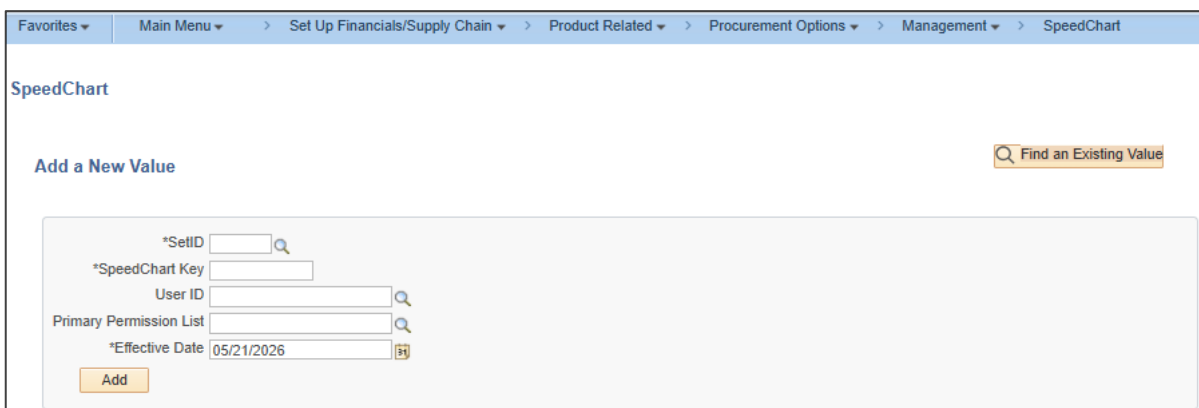
The **SpeedChart Find an Existing Value Search** page displays.

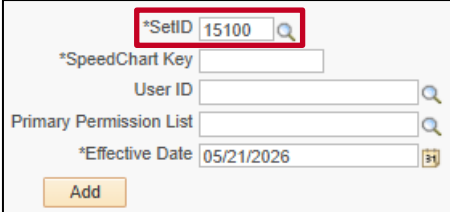
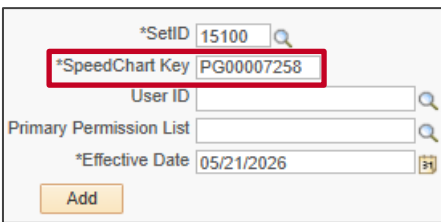




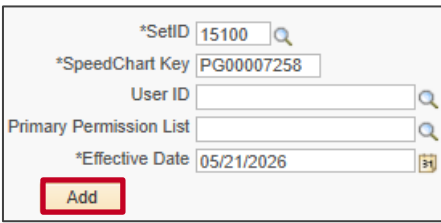


2. Click the **Add a New Value** button.



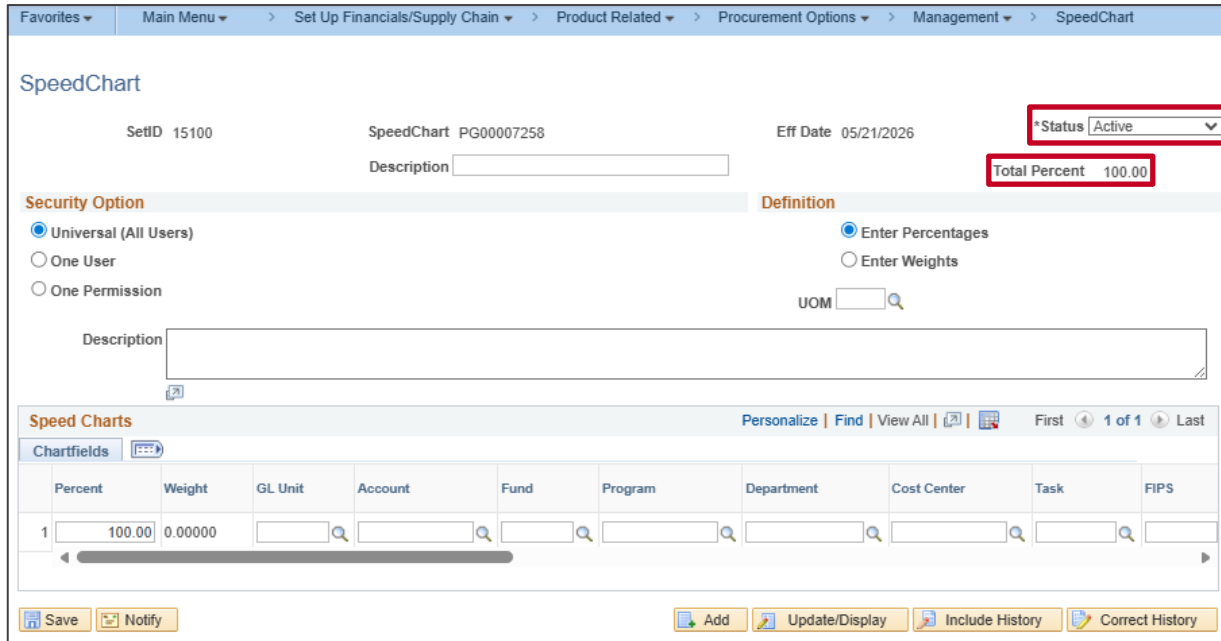
The **SpeedChart Add a New Value** page displays.



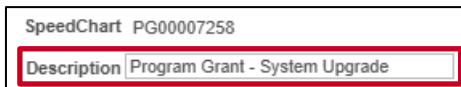
Step	Action
3.	<p>Enter the Agency Business Unit number in the <b>SetID</b> field.</p> 
4.	<p>Enter the name of the SpeedChart Key in the <b>SpeedType Key</b> field.</p> 
	<p>The <b>Effective Date</b> defaults to the current date. Update the date if needed.</p>
	<p>Consider naming the SpeedChart Key using some logic in the name for users to remember more easily. For example, name the SpeedChart Key after a project number that is related to a specific grant. In this scenario, "PG00007258" is entered. The <b>SpeedChart Key</b> field is up to 10 characters in length.</p>
	<p>The <b>SpeedChart Key</b> used should match the corresponding <b>SpeedType Key</b> for consistency.</p>
	<p>If a <b>User ID</b> or <b>Primary Permission List</b> is listed, only the specified user(s) will have access to the SpeedChart. Leave these fields blank, as all SpeedTypes are universally accessible.</p>
5.	<p>Click the <b>Add</b> button.</p> 

Step	Action
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The **SpeedChart** page displays.

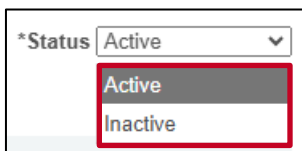


6. Enter a description in the **Description** field.




The **SpeedChart Key** description should match the corresponding **SpeedType Key** description for consistency.

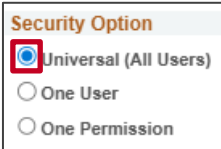

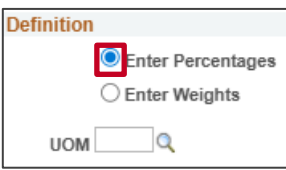
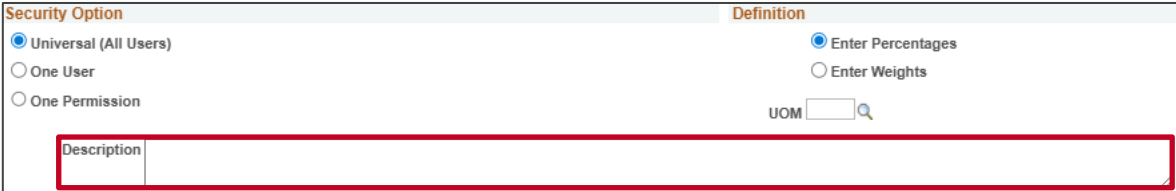
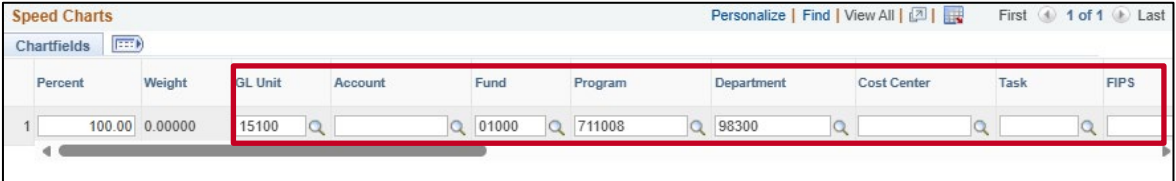


7. Select the Status of the SpeedChart. The status options are “Active” or “Inactive”.





The **Status** field defaults to “Active”. Once the SpeedChart is saved, it cannot be deleted. The **Status** can be updated to “Inactive” if the SpeedChart is no longer needed, by adding an inactive effective dated row.



The **Total Percent** field indicates the total of the proration percentages for all lines under the **Speed Charts** section. If additional lines are added, the total percentage amounts in the **Percent** fields need to add to 100 percent for all lines.

Step	Action																				
8.	<p>Select the <b>Universal</b> radio button in the <b>Security Option</b> section so that all users can access the <b>SpeedChart</b>.</p> 																				
	<p>The <b>One User</b> option allows access to a single user. The <b>One Permission</b> option allows access to users who are on a specific Permission List.</p>																				
9.	<p>The <b>Enter Percentages</b> radio button is selected by default. Select the <b>Enter Percentages</b> radio button if not selected.</p> 																				
10.	<p>Enter a long description in the <b>Description</b> field.</p> 																				
11.	<p>Enter the ChartFields into each of the specific <b>Chartfield</b> fields for this <b>SpeedChart</b>. Move the scroll bar to the right for additional ChartFields to add additional lines.</p>  <table border="1" style="margin-top: 10px;"> <thead> <tr> <th>Percent</th> <th>Weight</th> <th>GL Unit</th> <th>Account</th> <th>Fund</th> <th>Program</th> <th>Department</th> <th>Cost Center</th> <th>Task</th> <th>FIPS</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>100.00</td> <td>0.00000</td> <td>15100</td> <td>01000</td> <td>711008</td> <td>98300</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Percent	Weight	GL Unit	Account	Fund	Program	Department	Cost Center	Task	FIPS	1	100.00	0.00000	15100	01000	711008	98300			
Percent	Weight	GL Unit	Account	Fund	Program	Department	Cost Center	Task	FIPS												
1	100.00	0.00000	15100	01000	711008	98300															
	<p>Enter in as many ChartFields as applicable in order for the SpeedChart to be useful. When a SpeedChart is selected in a module, Users can add, modify or delete ChartFields if changes are needed for that specific transaction.</p>																				
12.	<p>Click the <b>Save</b> button.</p> 																				

Step	Action
	Updates can be made to existing <b>SpeedCharts</b> . Navigate to the <b>SpeedChart Find an Existing Value Search</b> page and enter in the applicable fields to identify the <b>SpeedChart</b> that needs to be updated. Update the applicable fields and, once all updates have been completed, click the <b>Save</b> button.