

SpeedTypes and SpeedCharts Overview

This Job Aid provides an overview of the process to set up SpeedTypes and 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 Expense transactions, General Ledger journal entries, Accounts Receivable direct journals, Commitment Control budget journal entries and Time & Attendance transactions.

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

Please note that if a SpeedType is created (other than CIPPS related), 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

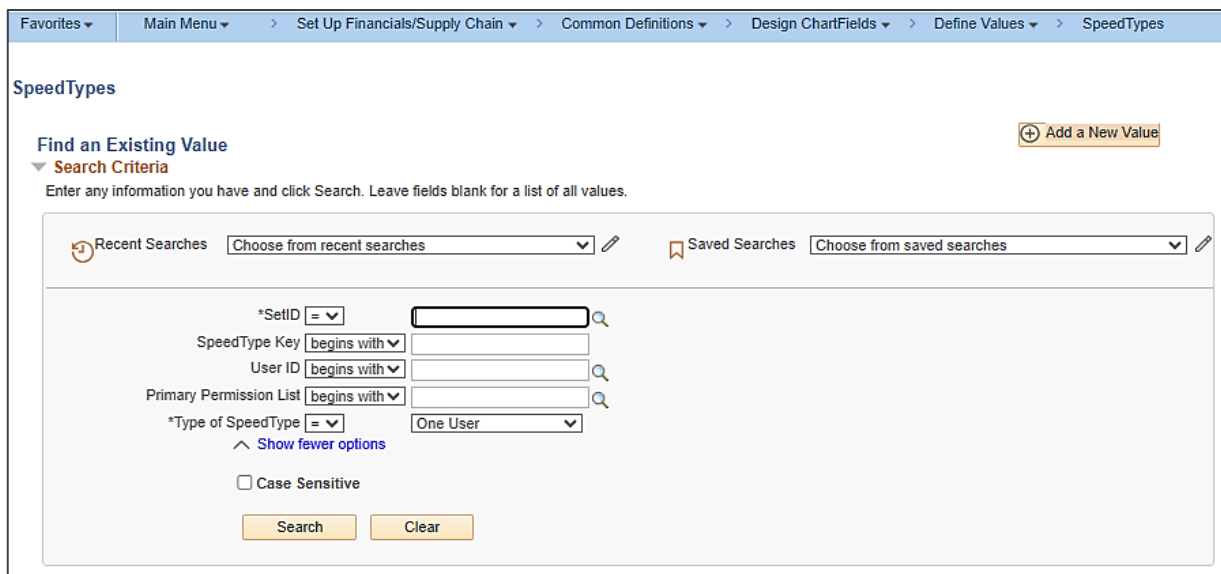
Revision Date	Summary of Changes
05/21/2026	Baseline.

Creating a SpeedType

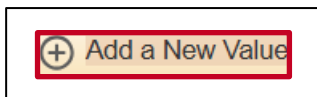
Please note that if a **SpeedType** is created (other than CIPPS related), a corresponding **SpeedChart** must be created as well, and vice versa. See the section of this Job Aid titled [Creating a SpeedChart](#).

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

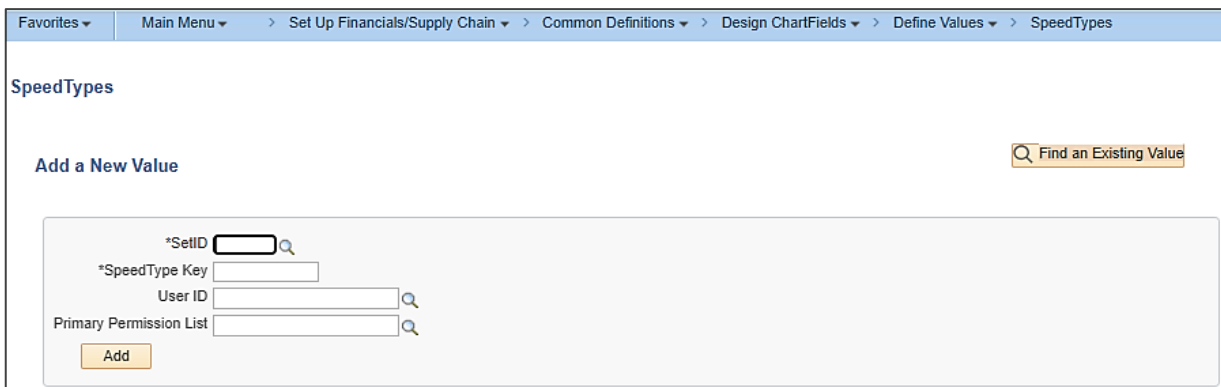
The **SpeedTypes Find an Existing Value Search** page displays.





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



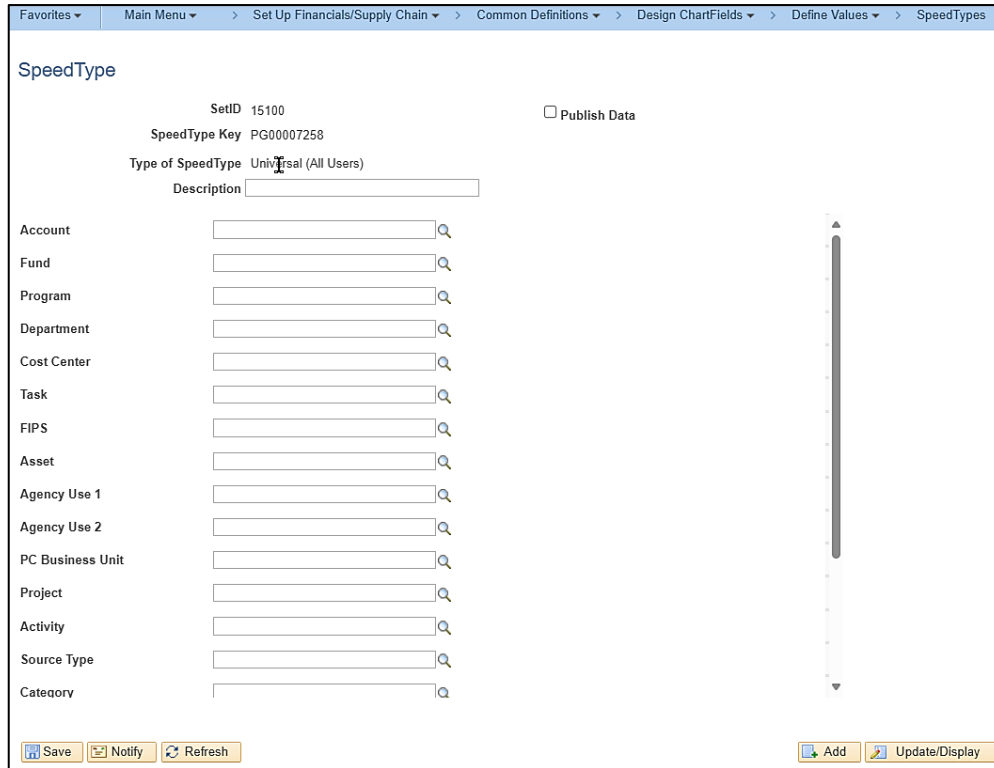
The **SpeedTypes Add a New Value** page displays.



Step	Action
3.	Enter the Agency Business Unit number in the SetID field. <div data-bbox="289 380 737 562" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px;">*SetID 15100</div> <div style="font-size: 0.8em;">🔍</div> </div> <div style="margin-top: 5px;">*SpeedType Key <input type="text"/></div> <div style="margin-top: 5px;">User ID <input type="text"/></div> <div style="margin-top: 5px;">Primary Permission List <input type="text"/></div> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Add"/> </div> </div>
	Do not enter STATE in the SetID field. Enter the Agency Business Unit number.
4.	Enter the name to be used for the SpeedType Key. <div data-bbox="289 760 737 942" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px;">*SetID 15100</div> <div style="font-size: 0.8em;">🔍</div> </div> <div style="margin-top: 5px;"> <div style="border: 2px solid red; padding: 2px;">*SpeedType Key PG00007258</div> </div> <div style="margin-top: 5px;">User ID <input type="text"/></div> <div style="margin-top: 5px;">Primary Permission List <input type="text"/></div> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Add"/> </div> </div>
	<p>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 SpeedType Key field is up to 10 characters in length.</p> <p>The SpeedType Key used should match the corresponding SpeedChart Key for consistency.</p> <p>If a User ID or Primary Permission List is listed, only the specified user(s) will have access to the SpeedType. Leave these fields blank, as all SpeedTypes are universally accessible.</p>
5.	Click the Add button. <div data-bbox="289 1362 737 1545" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; padding: 2px;">*SetID 15100</div> <div style="font-size: 0.8em;">🔍</div> </div> <div style="margin-top: 5px;">*SpeedType Key PG00007258</div> <div style="margin-top: 5px;">User ID <input type="text"/></div> <div style="margin-top: 5px;">Primary Permission List <input type="text"/></div> <div style="text-align: center; margin-top: 10px;"> <div style="border: 2px solid red; padding: 2px; display: inline-block;">Add</div> </div> </div>

Step	Action
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The **SpeedType** page displays.



SpeedType

SetID 15100 Publish Data

SpeedType Key PG00007258

Type of SpeedType Universal (All Users)

Description

Account

Fund

Program

Department

Cost Center

Task

FIPS

Asset

Agency Use 1

Agency Use 2

PC Business Unit

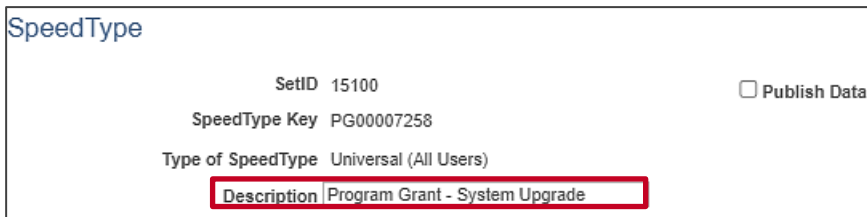
Project

Activity

Source Type

Category

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



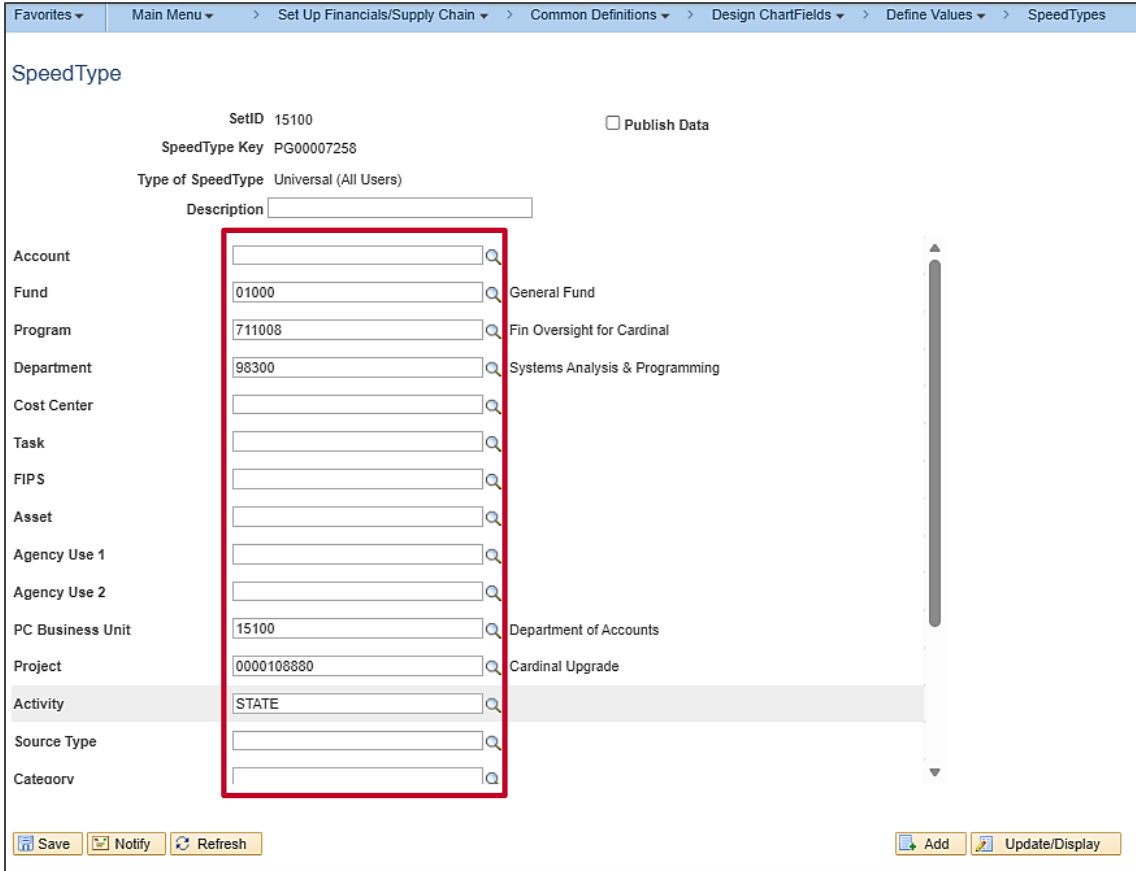

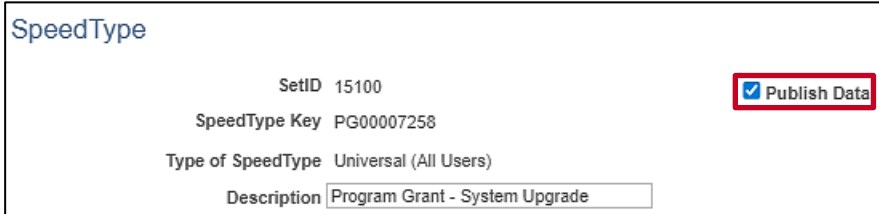

SpeedType


SetID 15100 Publish Data

SpeedType Key PG00007258

Type of SpeedType Universal (All Users)

Description Program Grant - System Upgrade

Step	Action
7.	<p>Enter the ChartFields into each of the specific Chartfield 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 Publish Data checkbox option. This ensures the SpeedType is sent to the Human Capital Management (HCM) environment.</p> 
9.	<p>Click the Save button.</p> 

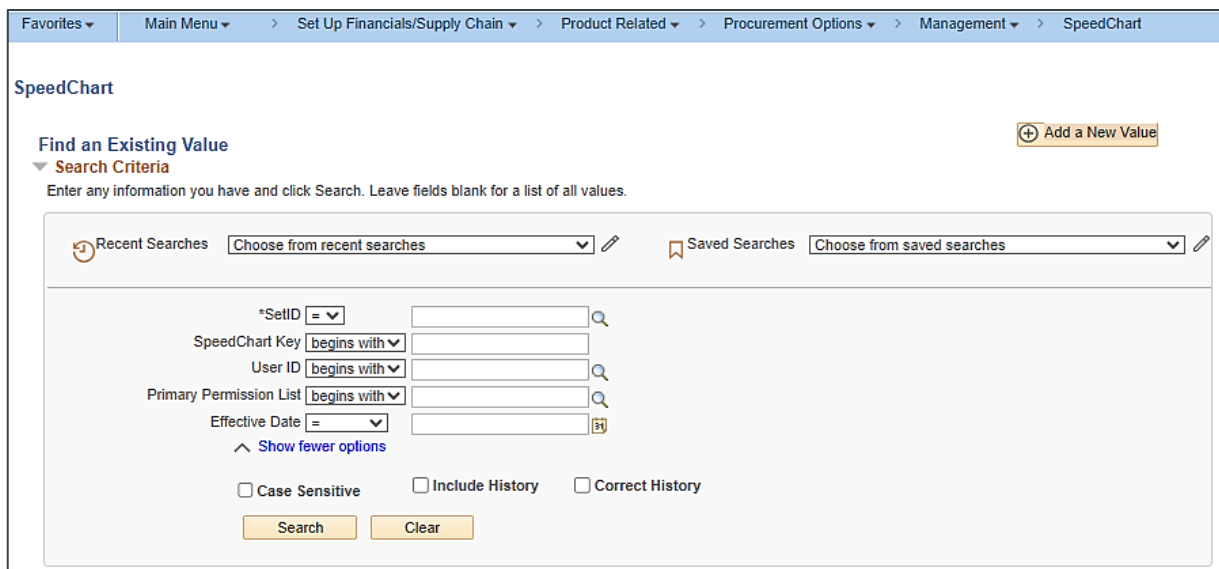
Step	Action
	Updates can be made to existing SpeedTypes . Navigate to the SpeedTypes Find an Existing Value page and enter in the applicable fields to identify the SpeedType that needs to be updated. Update the applicable fields. Once all updates have been completed, click the Save button.

Creating a SpeedChart

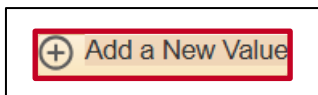
Please note that if a **SpeedChart** is created (other than CIPPS related), a corresponding **SpeedType** must be created as well, and vice versa. See the section of this Job Aid titled [Creating a SpeedType](#).

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

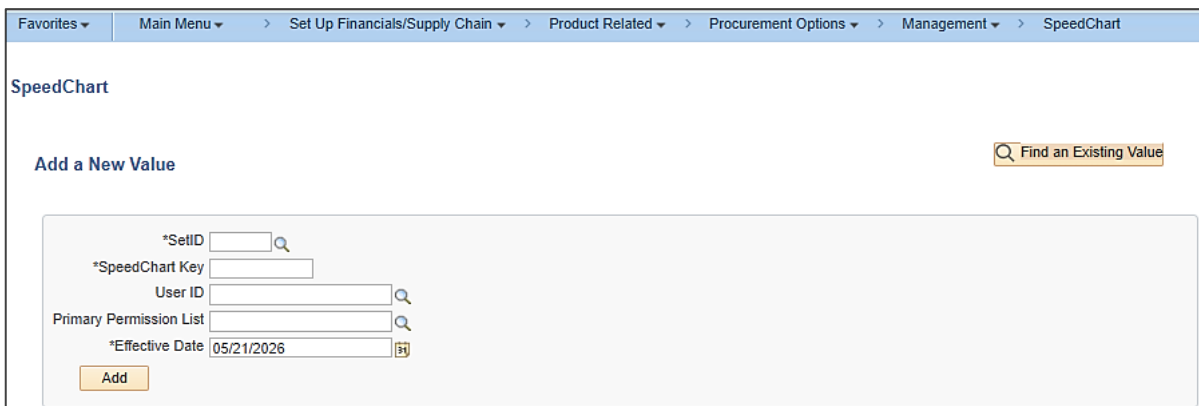
The **SpeedChart Find an Existing Value Search** page displays.

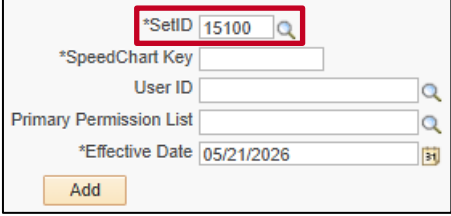
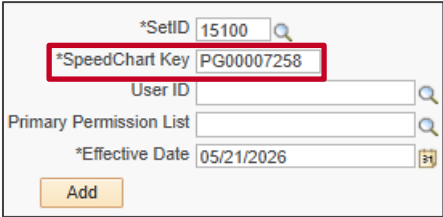


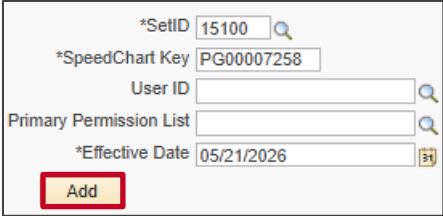


2. Click the **Add a New Value** button.



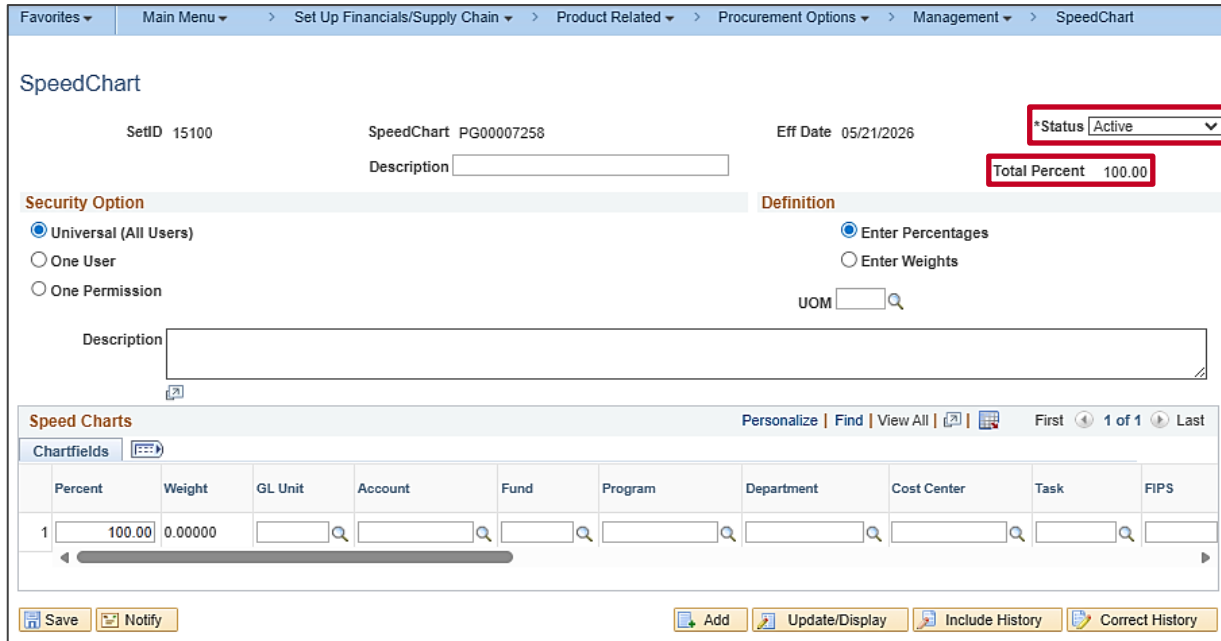
The **SpeedChart Add a New Value** page displays.



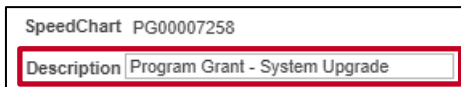
Step	Action
3.	Enter the Agency Business Unit number in the SetID field. <div data-bbox="300 380 748 594" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>*SetID 15100</p> <p>*SpeedChart Key</p> <p>User ID</p> <p>Primary Permission List</p> <p>*Effective Date 05/21/2026</p> <p>Add</p> </div>
4.	Enter the name of the SpeedChart Key in the SpeedType Key field. <div data-bbox="300 678 740 892" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>*SetID 15100</p> <p>*SpeedChart Key PG00007258</p> <p>User ID</p> <p>Primary Permission List</p> <p>*Effective Date 05/21/2026</p> <p>Add</p> </div>
	The Effective Date defaults to the current date. Update the date as needed.
	<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 SpeedChart Key field is up to 10 characters in length.</p> <p>The SpeedChart Key used should match the corresponding SpeedType Key for consistency.</p> <p>If a User ID or Primary Permission List 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.	Click the Add button. <div data-bbox="300 1392 740 1606" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>*SetID 15100</p> <p>*SpeedChart Key PG00007258</p> <p>User ID</p> <p>Primary Permission List</p> <p>*Effective Date 05/21/2026</p> <p>Add</p> </div>

Step	Action
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The **SpeedChart** page displays.

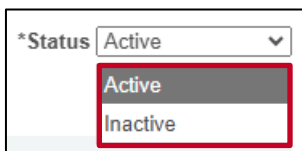


6. Enter a description in the **Description** field.




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.	Select the Universal radio button option in the Security Option section so that all users can access the SpeedChart . <div data-bbox="300 409 519 556" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Security Option</p> <p><input checked="" type="radio"/> Universal (All Users)</p> <p><input type="radio"/> One User</p> <p><input type="radio"/> One Permission</p> </div>																				
	The One User option allows access to a single user. The One Permission option allows access to users who are on a specific Permission List.																				
9.	The Enter Percentages radio button option is selected by default. Select the Enter Percentages radio button option if not selected. <div data-bbox="292 793 576 951" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Definition</p> <p><input checked="" type="radio"/> Enter Percentages</p> <p><input type="radio"/> Enter Weights</p> <p>UOM <input type="text"/> <input type="button" value="Q"/></p> </div>																				
10.	Enter a long description in the Description field. <div data-bbox="292 1039 1461 1228" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Security Option</p> <p><input checked="" type="radio"/> Universal (All Users)</p> <p><input type="radio"/> One User</p> <p><input type="radio"/> One Permission</p> </div> <div style="width: 45%;"> <p>Definition</p> <p><input checked="" type="radio"/> Enter Percentages</p> <p><input type="radio"/> Enter Weights</p> <p>UOM <input type="text"/> <input type="button" value="Q"/></p> </div> </div> <div style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <p>Description <input style="width: 90%;" type="text"/></p> </div> </div>																				
11.	Enter the ChartFields into each of the specific Chartfield fields for this SpeedChart . Move the scroll bar to the right for additional ChartFields to add additional lines. <div data-bbox="300 1354 1469 1528" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Speed Charts Personalize Find View All <input type="button" value="Q"/> <input type="button" value="Q"/> First 1 of 1 Last</p> <p>Chartfields <input type="button" value="Q"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <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 <input type="button" value="Q"/></td> <td><input type="text"/> <input type="button" value="Q"/></td> <td>01000 <input type="button" value="Q"/></td> <td>711008 <input type="button" value="Q"/></td> <td>98300 <input type="button" value="Q"/></td> <td><input type="text"/> <input type="button" value="Q"/></td> <td><input type="text"/> <input type="button" value="Q"/></td> </tr> </tbody> </table> </div>	Percent	Weight	GL Unit	Account	Fund	Program	Department	Cost Center	Task	FIPS	1	100.00	0.00000	15100 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	01000 <input type="button" value="Q"/>	711008 <input type="button" value="Q"/>	98300 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>
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	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.																				
12.	Click the Save button. <div data-bbox="300 1753 560 1816" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p><input checked="" type="button" value="Save"/> <input type="button" value="Notify"/></p> </div>																				

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