Western PeopleSoft Financials
Speed Codes

Objectives

By the end of this exercise you will be able to:

- Understand what a Speed Code is
- Translate Speed Codes to the Chartfield combination
- Look up Speed Codes in PeopleSoft

Content

1. What is a Speed Code and How Does It Relate to a Chartfield
2. Speed Code Inquiry From Chartfield to Speedcode
3. Speed Code Inquiry From Speed Code to Chartfield
4. Using the Speedcode Translator on the Financial Services Web Site
5. Account Codes
1. What is a Speed Code and How Does It Relate to a Chartfield

Speed Codes have been created to provide shortcuts for look up, data entry, and placing orders with System Contract suppliers and Campus operations.

A **Speed Code** is 4 digits in length and is used in conjunction with a 6 digit **Account Code** (Account Code classifies the type of revenue or expense). The Speed Code represents a larger combination of codes called a **Chartfield** comprised of a Fund, Department, and Program or Project/Grant. The Speed Code/Chartfield combination plus the Account Code is used for all transactional data and in reporting. For example a complete code using the Speed Code could be **AA56 622000**, where AA56 represents the Speed Code and 622000 the Account Code.

The following chart describes this relationship, as well as shows valid Chartfield combinations, that is, which Funds can be combined with a Program which with a Project or Grant.

A Speed Code represents the combination of a Business Unit (**UWO** is the most common) plus Chartfields comprised of Fund, Department, and either Program or Project/Grant.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Department</th>
<th>Program</th>
<th>Project or Grant</th>
<th>Speed Code</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 digit</td>
<td>6 digits</td>
<td>5 digits</td>
<td>Project Grant 99A999 R9999X99</td>
<td>4 digits</td>
<td>6 digits</td>
</tr>
<tr>
<td>1</td>
<td>Operating</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>2</td>
<td>Research</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>3</td>
<td>Ancillary</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>4</td>
<td>Other</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>5</td>
<td>Endowed</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>6</td>
<td>Capital</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Must be used with all Funds or can only be used with this Fund**
2. **Speed Code Inquiry From Chartfield to Speedcode**

**Navigation:** UWO Menu/UWO Inquiries/Speed Code Inquiry

If you have not previously done so, **Add a New Value** named **SpeedCode**. Once you have set up this inquiry you can use the search.

The search will open the next window to enter Speed Code inquiry criteria.

1. Click in the **Speed Code Lookup** selection and the boxes to enter **Dept**, **Program Code** or **Project** will be available.
2. Type the chartfield value in the appropriate box. If you only know part of the chartfield, you can type what you know, then click on the magnifying glass beside that field to get a list.

A valid chartfield combination will include a Program or a Project but never both. Therefore to disallow the selection of both, once you enter a Program Code the Project box will disappear or once you enter a Project the Program Code box will disappear.
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3. If you want to look up all Speed Codes for a Department then enter just the Department number.

4. **Click View Details**

```
Speed Code Inquiry Criteria  Speed Code Inquiry Results
User ID:  EGRAY28  Inquiry Name:  SPEEDCODE

Speed Code Inquiry Type  ○ Speed Code Lookup  ○ Chart of Account Lookup

Dept:  470400  Program Code:  Project:  

Speed Code Inquiry Ordering  Speed Code Inquiry Column Sort Order
○ Ascending  ○ Descending

Exclue  1  2  3  4
Speed Code Key  ○ ○ ○ ○
Department  ○ ○ ○ ○
Program Code  ○ ○ ○ ○
Project / Grant  ○ ○ ○ ○
```

5. You will be taken to the **Speed Code Inquiry Results** window as in the example below.

```
Speed Code Inquiry Criteria  Speed Code Inquiry Results
User ID:  EGRAY28  Inquiry Name:  SPEEDCODE

Department:  470400  Program Code:  Project:  

Speed Code Key:  HK51  Health Svs-Faculty-Gene
Unit:  Fund:  Dept:  Program:  Project:  
UWO  3  470400  00000

Speed Code Key:  HK12  Health Svs-Faculty-Faculty-Bene
Unit:  Fund:  Dept:  Program:  Project:  
UWO  1  470400  38214

Speed Code Key:  HK11  Health Svs-Faculty-Staff
Unit:  Fund:  Dept:  Program:  Project:  
UWO  1  470400  38001
```
3. Speed Code Inquiry From Speed Code to Chartfield

**Navigation:** UWO Menu/UWO Inquiries/Speed Code Inquiry

1. Click in the **Chart of Account Lookup** selection and enter the 4 character Speed Code in the **Speed Code Key** box.

2. Click **View Details**

3. You will be taken to the **Speed Code Inquiry Results** window as in the example below.
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4. Using the Speedcode Translator on the Financial Services Web Site

Speed Codes can also be translated to their full Chartfield combination using the Speed Code Translator link on the Financial Services website, PeopleSoft Documentation page.

5. Account Codes

A comprehensive list of Expense Accounts can be accessed from the Financial Services web site, PeopleSoft Documentation page link Expense Accounts

The most commonly used non-salary Expense Accounts are listed below.

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>603460</td>
<td>Subject Fees</td>
<td>622000</td>
<td>Supplies</td>
</tr>
<tr>
<td>603465</td>
<td>Subject Fees - Advances</td>
<td>622210</td>
<td>Supplies – Animal Care</td>
</tr>
<tr>
<td>603480</td>
<td>Professional Dues</td>
<td>622120</td>
<td>Supplies – Animal Feed</td>
</tr>
<tr>
<td>603390</td>
<td>Consultation Fees</td>
<td>625100</td>
<td>Telephone</td>
</tr>
<tr>
<td>605400</td>
<td>Computing Equipment</td>
<td>625150</td>
<td>Telephone – Long Distance</td>
</tr>
<tr>
<td>605420</td>
<td>Computer – PCs</td>
<td>625250</td>
<td>Telephone – Install/Service Charge</td>
</tr>
<tr>
<td>605430</td>
<td>Computer – Peripherals</td>
<td>625330</td>
<td>Cell Phone Air Time</td>
</tr>
<tr>
<td>605500</td>
<td>Equipment &amp; Apparatus</td>
<td>625400</td>
<td>Telecommunications</td>
</tr>
<tr>
<td>607740</td>
<td>Maintenance – Equipment</td>
<td>625450</td>
<td>Fax Charges</td>
</tr>
<tr>
<td>621100</td>
<td>Advertising</td>
<td>631400</td>
<td>Registration Fees</td>
</tr>
<tr>
<td>621250</td>
<td>Computer Software</td>
<td>631450</td>
<td>Seminars &amp; Conferences</td>
</tr>
<tr>
<td>621400</td>
<td>Printing &amp; Duplicating</td>
<td>631600</td>
<td>Receptions &amp; Entertainment</td>
</tr>
<tr>
<td>621410</td>
<td>Photocopying</td>
<td>645000</td>
<td>Travel – General</td>
</tr>
<tr>
<td>621800</td>
<td>Postage</td>
<td>645100</td>
<td>Travel – Advance</td>
</tr>
<tr>
<td>621830</td>
<td>Courier</td>
<td>645500</td>
<td>Travel – Meals</td>
</tr>
<tr>
<td>621930</td>
<td>Services – Lab Fees</td>
<td>646400</td>
<td>Transportation – General</td>
</tr>
<tr>
<td>621965</td>
<td>Shop Services</td>
<td>646500</td>
<td>Transportation - Air</td>
</tr>
</tbody>
</table>