

3.0 Appendix B – Project Aspire Enhancement Functional Design

ADML ID	ADML 1792
ADML Description	SpeedType
ADML Tech#	ADML 1792

3.1 Background

3.1.1 Functional Requirement

The State of Florida often has common transactions in which they must enter the same combination of ChartFields (business unit, account, org etc) values repeatedly. By creating shortcut keys called Speed Types for these frequently used combinations of ChartFields; one can greatly increase journal entry efficiency and reduce errors. The State of Florida has adopted this delivered business process to assist in the entry of journal transactions. However, the State of Florida would like the ability to eliminate the Speed Type availability upon management request. Currently, PeopleSoft does not support a status for the SpeedType. The State of Florida would like to either activate or inactivate a SpeedType for use. The issue arises when the GL team creates a SpeedType. Eventually, management would like the ability to inactivate this speed type from use in the future. The management would like to remove the value from the prompt table, thus not allowing entry personnel from selecting the Speed Type value.

This design will assist the State of Florida in applying this modification to the system. The State of Florida would like the ability to create a Speed Type. Activate or de-activate the Speed Type upon management request. Additionally, the State of Florida would like the ability to track the individual, the date and time the Speed Type was modified and to report on all the Speed Type values.

3.1.2 Delivered Functionality

Delivered PeopleSoft functionality allows the Speed Type utilization but does not deliver a status with the values. Thus, there is no on-line method to inactivate a SpeedType from being used for transaction entry.

3.1.3 Gap Description

Journal Entry functionality in Aspire requires the ability to create a SpeedType and inactivate this Speed Type when deemed necessary in the future. The State of Florida also requires the ability to re-activate this Speed Type upon request. Additionally, the State of Florida requires the ability to obtain reporting capabilities to view the Speed Type was altered, the operator that altered the values and the date and time the alteration took place.

3.2 Description of New Functionality

This design will assist the State of Florida in applying this modification to the system. The State of Florida would like the ability to create a Speed Type. Activate or de-activate the Speed Type upon management request. The State of Florida requires the ability to track the individual, the date and time the Speed Type was modified and to report and sort on all the Speed Type values.

3.3 Navigation path

To enter a new Speed Type:

Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > SpeedTypes:

Original Page:

PeopleSoft. Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Menu

- General Ledger
- Allocations
- Statutory Reports
- Data Exchanges
- Set Up Financials/Supply Chain
 - Install
 - Security
 - Upgrade
 - Business Unit Related
 - Common Definitions
 - Accounting Entry Templates
 - Activities
 - Agency Location Codes
 - Bank Branch File
 - Calendars/Schedules
 - Codes and Auto Numbering
 - Currency
 - Customers
 - Design ChartFields
 - Configure
 - ChartField Audits
 - Define Values
 - ChartField Values
 - Account Types
 - SpeedTypes**
 - Load Tree Detail Values
 - Combination Editing
 - ChartField Value Sets
 - ChartField Inheritance
 - Review
 - Reports
 - Distribution Accounting
 - Document Sequencing
 - Documentum

SpeedType

SetID: SHARE
SpeedType Key: PERIPHERAL
Type of SpeedType: One User **User ID:** VP1
Description: COGS Peripheral Products

Account:	500000	Cost of Goods Sold
Alternate Account:		
Operating Unit:		
Fund Code:		
Department:	21200	Western Sales Region
Program Code:		
Class Field:		
Budget Reference:		
Product:	CONFIG	Configuration Services
Project:		
Affiliate:		
Fund Affiliate:		
Operating Unit Affiliate:		
Currency Code:		
Statistics Code:		

New Page:

SpeedType

SetID: SHARE
SpeedType Key: PERIPHERAL
Type of SpeedType: One User **User ID:** VP1
Description:

Status: **Modified:** 08/03/2005 1:46PM **By:** tmillion

Account:	<input type="text" value="500000"/>	<input type="button" value="Search"/>	Cost of Goods Sold
Alternate Account:	<input type="text"/>	<input type="button" value="Search"/>	
Budget Entity:	<input type="text"/>	<input type="button" value="Search"/>	
Fund Code:	<input type="text"/>	<input type="button" value="Search"/>	
Organization:	<input type="text" value="21200"/>	<input type="button" value="Search"/>	Western Sales Region
Approp Year:	<input type="text"/>	<input type="button" value="Search"/>	
Location:	<input type="text"/>	<input type="button" value="Search"/>	
Activity Issue:	<input type="text"/>	<input type="button" value="Search"/>	
Category:	<input type="text" value="CONFIG"/>	<input type="button" value="Search"/>	Configuration Services
Project:	<input type="text"/>	<input type="button" value="Search"/>	
Affiliate:	<input type="text"/>	<input type="button" value="Search"/>	
Fund Affiliate:	<input type="text"/>	<input type="button" value="Search"/>	
Operating Unit Affiliate:	<input type="text"/>	<input type="button" value="Search"/>	
Currency Code:	<input type="text"/>	<input type="button" value="Search"/>	
Statistics Code:	<input type="text"/>	<input type="button" value="Search"/>	

Note the added fields just below the description encircled in red:

1. Status
2. Modified
3. By

3.4 Set Up/Control Data

N/A

3.5 Application Changes (e.g., Pages, Components, Menus, Records, App Engines, SQRs, etc.)

SPEED_USER_TBL – Add four additional fields to the table and alter the table

1. EFF_STATUS
2. MODIFIED_DT
3. CHNG_TIME_VALUE
4. OPRID_MODIFIED_BY

SPEEDTYP_ALL_VW – Add the Effective status to the SQL logic to populate the view.

3.6 Unit Test Considerations

- Create a new SpeedType with a status of “active”.
Navigation:
Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > SpeedTypes
Enter a valid combination for the chartfield string.
- Navigate to the journal entry page:
General Ledger > Journals > Journal Entry > Create Journal Entries
- Enter a new journal entry utilizing the SpeedType field on the “Line” tab.
- Validate that the chartfields apply to the journal line as defined when creating the Speed Type.
- Edit and post the journal to be sure the system will accept the chartfield string.
- Navigate back to the SpeedType definition page:
Navigation:
Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > SpeedTypes
Enter a valid combination for the chartfield string.
- Enter the SpeedType that was created earlier for the search page. Set the status to inactive.
- Navigate to the journal entry page:
General Ledger > Journals > Journal Entry > Create Journal Entries.

- Enter a new journal and attempt to enter the SpeedType that was just inactivated. The system should not let you:
 - Manually enter the value
 - When searching the prompt, the SpeedType should not be listed in available values.
- Navigate to the Query reporting tool in PeopleSoft Reporting Tools > Query > Query Manager
- Access the FIN0007_SPEETYPE query
- Execute this query and view the results.
- Download the results to Excel for sorting and formatting.

3.7 Miscellaneous

N/A

3.8 Assumptions

N/A