

Chart of Accounts Requisitions and Travel

WHAT REMAINS THE SAME?

- The look and feel is almost identical
- You only need to know ONE piece of information for your accounting line information: Speed Key

WHAT CHANGES?

- You will only need one piece of information, Speedkey. Operating Unit will now default in as "0" base on the Speed Key.
- Approval routing for funding approval will be routed to department managers or project managers based on Speed Key
- Related Content has been added to both requisition and travel pages as shown below under RESOURCES

RESOURCES

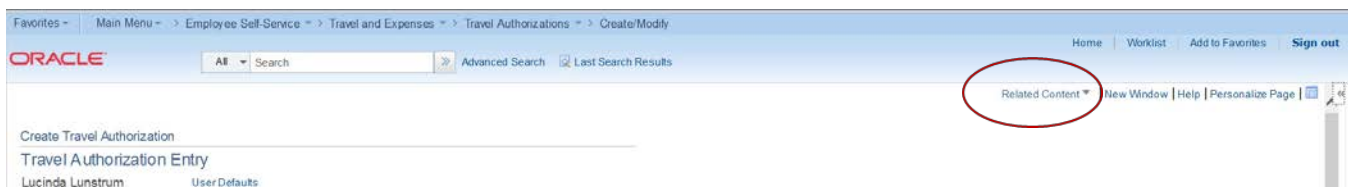
Related Content has been added to the requisition and travel entry pages to help users identify their new Speed Keys for accounting line information.

After clicking Create New Requisition or Create/Modify - Add for travel authorizations or expense reports, look for the Related Content down arrow as shown here:

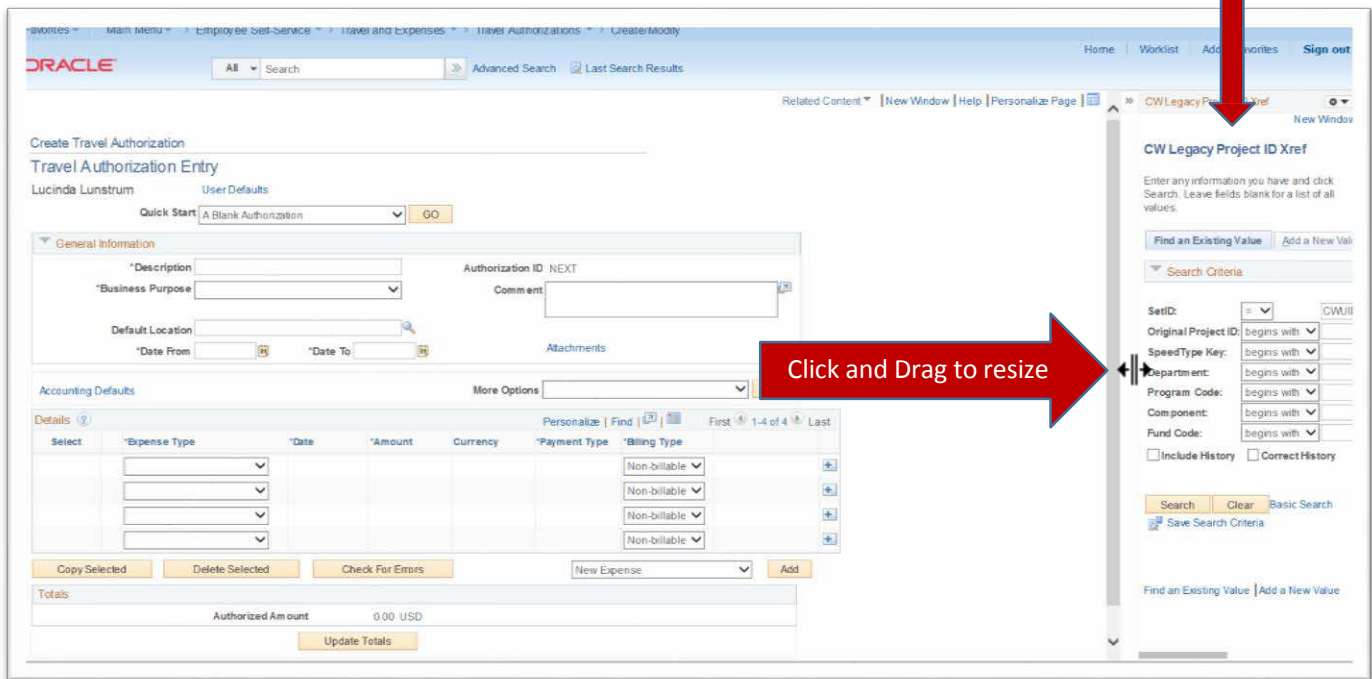
REQUISITIONS:



TRAVEL



Click the down arrow of related content and then click on the CW Legacy Project ID Xref link. The Related Content will open in the right side bar area and look like this:



If needed, you can put your cursor on the left border of the CW Legacy Project ID Xref, and when you have the double headed cursor, $\leftarrow\rightarrow$, drag the border to the left to see more of the page.

Although the Travel Authorization page has been used for this documentation, the Related Content will look the same for Travel Expense Reports and Requisitions.

Enter your pre-COA project ID in the Original Project ID text field and click Search to see the new Speed Key:



In the Accounting Defaults, Requisition Settings, or Accounting Lines pages, enter the new Speed Key. Check to be certain that the Fund, Dept, and other relevant chart fields have filled in:

Create Travel Authorization

Accounting Defaults

Lucinda Lunstrum Authorization ID NEXT

Accounting Summary Set Personalizations | Find | First 1 of 1 Last

%	*GL Unit	Speed Key	Oper Unit	Fund	Dept	Program	Component	Project
100.0	CWUID	4700100007	1	149	470010	043		

NOTE: If you enter your Speed Key in the Defaults or Settings, and then navigate to the Accounting Detail for one of your line items, the Speed Key will not be retained, but the full chartstring will be there:

Create Travel Authorization

Accounting Detail

Lucinda Lunstrum Authorization ID NEXT

This is the accounting detail for expense type International - Lodging with a transaction date of in the amount of 0 USD. If changes are made inadvertently, you may reset the default accounting values by hitting the 'Restore Defaults' button.

Accounting Summary Set Personalizations | Find | First 1 of 1 Last

Amount	*GL Unit	Speed Key	Account	Oper Unit	Fund	Dept	Program	Component	Project
0.00	CWUID		53895	1	149	470010	043		

Continue building your document as before.

NOTE: It is normal for the Speed Key field to return to blank after the rest of the chartfields auto populate. Speed Key is not retained on the accounting lines.

ADDITIONAL RESOURCES

PURCHASING OFFICE: EXT 1002; PURCHASING_OFFICE@CWU.EDU

TRAVEL DESK: EXT 1986; TRAVELDESK@CWU.EDU