Chart of Accounts
Requisitions and Travel

WHAT REMAINS THE SAME?

➢ The look and feel is almost identical
➢ You only need to know two pieces of information for your accounting line information: Pre COA you need Project ID and Oper Unit; Post COA – see below

WHAT CHANGES?

➢ Although you will only need two pieces of information, one of them is new: Speedkey; the other will still be Oper Unit
➢ Approval routing for funding approval will be routed to department managers or project managers based on Speedkey
➢ 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 SpeedKeys 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:
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, , 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 SpeedKey:
In the Accounting Defaults, Requisition Settings, or Accounting Lines pages, enter the new SpeedKey, tab to Oper Unit and add or select that value, then tab once more. Check to be certain that the Fund, Dept, and other relevant chart fields have filled in:

![Image of Accounting Defaults](image)

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

![Image of Accounting Detail](image)

Continue building your document as before.

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

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**ADDITIONAL RESOURCES**

PURCHASING OFFICE: EXT 1002; PURCHASING_OFFICE@CWU.EDU
TRAVEL DESK: EXT 1986; TRAVELDESK@CWU.EDU
SYSTEM SUPPORT: TIM MCGUIRE, LUCINDA LUNSTRUM