



Submitting a ChartField Request Form

This guide walks you through completing and submitting a Chartfield Request Form.

State of Vermont
Department of Finance & Management
VISION 9.2

January 2024

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Revisions to Manual

January 2019

- Manual written

January 2024

- Updated

Completing a ChartField Request Form for an Account Code

Situations where this form is used: When you need to add, update, or inactivate an Account Code.

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:

The screenshot shows the 'ChartField Request' form. At the top left is the title 'ChartField Request'. Below it is the section 'Add a New Value'. In the top right corner of this section is a button labeled 'Find an Existing Value' with a magnifying glass icon. Below this is a light gray box containing the form fields: '*Request ID' with the value 'NEXT', '*SetID' with the value 'STATE' and a magnifying glass icon, '*Field Name' with the value 'ACCOUNT' and a magnifying glass icon, '*Field Action' with a dropdown menu showing 'Add', and 'Field Value' with an empty text box and a magnifying glass icon. At the bottom left of the gray box is an 'Add' button.

Request ID defaults to NEXT

SetID enter STATE

Field Name select ACCOUNT from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (6 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Account ChartField Request** page opens:

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	ACCOUNT
Field Action	Add	*Field Value	551003
Telephone	802/828-0678	Email ID	john.becker@vermont.gov
*Business Unit	01110		

Core Information

☐ Control Account
☐ Statistical Account

*Effective Date 01/29/2019

*Status Active

Monetary Account Type E

Unit of Measure

*Description Test Account

*Short Description TestAcc

[Long Description](#)

Business Justification

Attachments (0)

Request Comments

Questions

*1. What is the reason for this new or changed Account? Please provide a Statute and/or Act authorizing this new Account or change to existing Account if one exists.

Answer

2. If this request is for a revenue account, what is the revenue source?

Answer

3. If this request is for an expense account, please describe the types of expenditures that would be charged to this account.

Answer

4. Any additional comments about this request?

Answer

Trees

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes **Control Account** – Leave unchecked

Statistical Account – Leave unchecked

Effective Date – Enter the effective date for the chartfield change

Status – Select ‘Active’ or ‘Inactive’ as appropriate

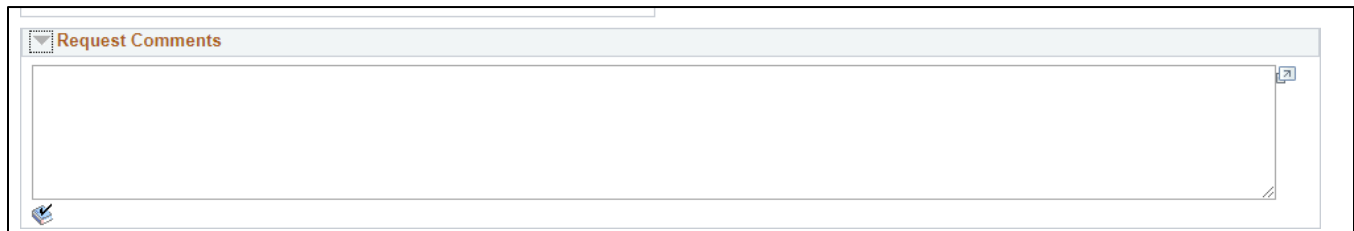
Monetary Account Type – Select the appropriate account type from the drop-down menu

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

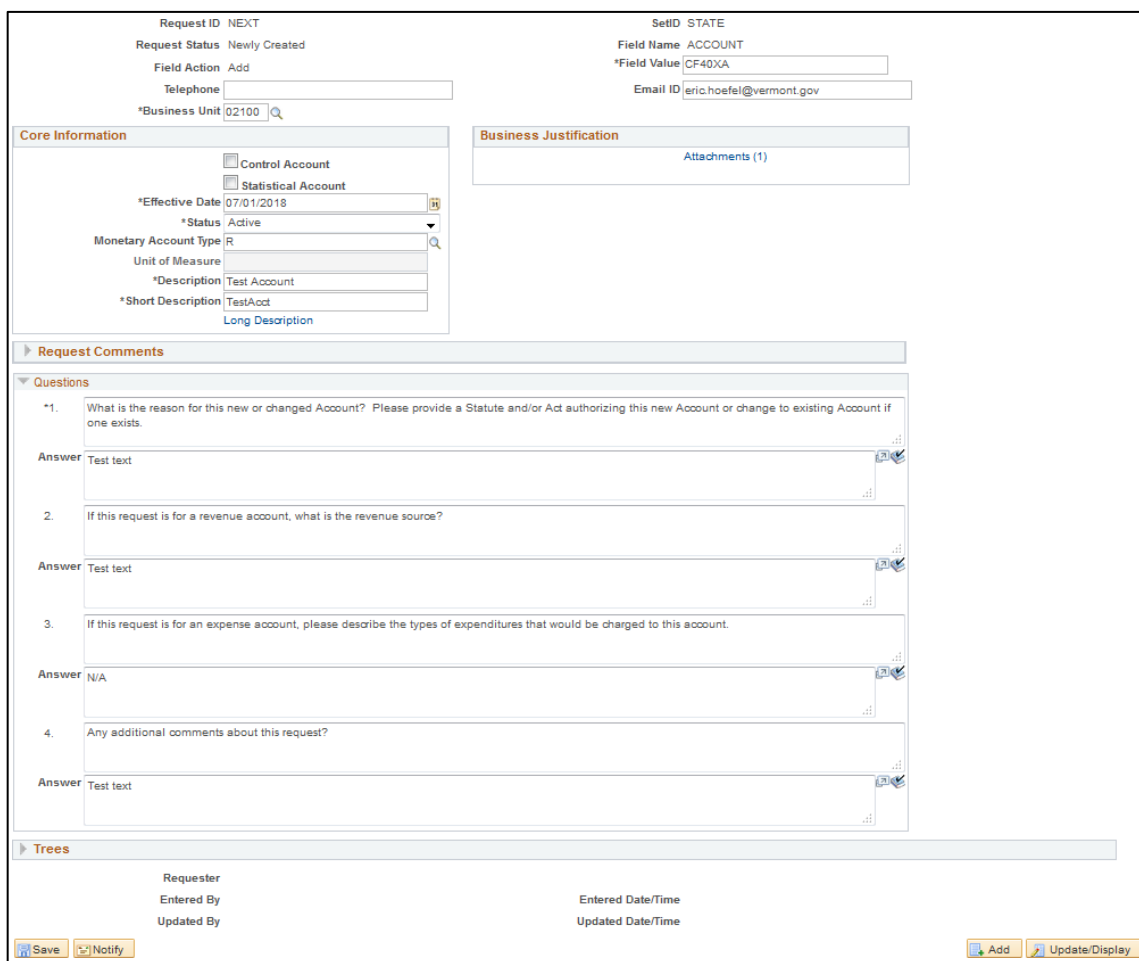
Long Description – Click the [long Description](#) link – this is an optional field where you can add any additional information about the Account Code that the requestor believes is important, for example a statute reference, or full name that can't fit in the Description box due to the limit of 30 characters.

Request Comments – Expand the [Request Comments](#) box – this is an optional field to add any relevant comments.

The screenshot shows a web interface with a tab labeled "Request Comments". Below the tab is a large, empty text area with a small icon in the top right corner, intended for entering comments.

The [Attachments](#) link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the four questions and click [Save](#):

The screenshot displays a comprehensive request form. At the top, it includes fields for "Request ID" (NEXT), "Request Status" (Newly Created), "Field Action" (Add), "Telephone", "Business Unit" (02100), "SetID" (STATE), "Field Name" (ACCOUNT), "Field Value" (CF40XA), and "Email ID" (eric.hoefel@vermont.gov). Below these are sections for "Core Information" (with checkboxes for Control and Statistical Accounts, and fields for Effective Date, Status, Monetary Account Type, Unit of Measure, Description, and Short Description) and "Business Justification" (with an "Attachments (1)" link). A "Request Comments" section is also present. The "Questions" section contains four numbered questions with corresponding answer fields: 1. Reason for new or changed Account; 2. Revenue source; 3. Types of expenditures; 4. Additional comments. At the bottom, there are "Trees" and a table with columns for Requester, Entered By, Updated By, Entered Date/Time, and Updated Date/Time. Action buttons for "Save", "Notify", "Add", and "Update/Display" are located at the very bottom.

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 000000007
Request Status Newly Created
Field Action Add
Telephone
*Business Unit 02100

SetID STATE
Field Name ACCOUNT
*Field Value CF40XA
Email ID eric.hoefel@vermont.gov

Copy

Core Information

☐ Control Account
☐ Statistical Account
*Effective Date 07/01/2018
*Status Active
Monetary Account Type R
Unit of Measure
*Description Test Account
*Short Description TestAcct
Long Description

Business Justification

Attachments (1)

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 000000007
Request Status Newly Created
Field Action Add
Telephone
*Business Unit 02100

SetID STATE
Field Name ACCOUNT
*Field Value CF40XA
Email ID eric.hoefel@vermont.gov

Copy

Core Information

☐ Control Account
☐ Statistical Account
*Effective Date 07/01/2018
*Status Active
Monetary Account Type R
Unit of Measure
*Description Test Account
*Short Description TestAcct
Long Description

Business Justification

Attachments (1)

Request Comments
Questions
Trees

Request Action Submit for Approval Go

Requester
Entered By ETEST Eric John Hoefel Entered Date/Time 10/30/2018 3:41PM
Updated By ETEST Eric John Hoefel Updated Date/Time 10/30/2018 3:41PM

Save Notify Add Update/Display

Click on the **View Approval Flow** link to see approval routing:

Request ID 000000007
Request Status Pending Approval
Field Action Add
Telephone
*Business Unit 02100

SetID STATE
Field Name ACCOUNT
*Field Value CF40XA
Email ID eric.hoefel@vermont.gov

Copy

Core Information

☐ Control Account
☐ Statistical Account
*Effective Date 07/01/2018
*Status Active
Monetary Account Type R
Unit of Measure
*Description Test Account
*Short Description TestAcct
Long Description

Business Justification

Attachments (1)

Request Comments
Questions
Trees

Request Action Go View Approval Flow

Requester ETEST Eric John Hoefel
Entered By ETEST Eric John Hoefel Entered Date/Time 10/30/2018 3:41PM
Updated By ETEST Eric John Hoefel Updated Date/Time 10/30/2018 3:47PM

Save Return to Search Notify Add Update/Display

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

Approval Flow

Help

Field Request Approval Stage

Request ID 0000000007:Pending

View/Hide Comments

Start New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker,John M
Description:	Becker,John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard
Close	

Completing a ChartField Request Form for a Class Code

Situations where this form is used: When you need to add, update, or inactivate a Class Code.

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' page. At the top left is the title 'ChartField Request'. Below it is a section titled 'Add a New Value'. In the top right corner of this section is a button labeled 'Find an Existing Value' with a magnifying glass icon. Below this is a form with the following fields: '*Request ID' with the value 'NEXT'; '*SetID' with the value 'STATE' and a magnifying glass icon; '*Field Name' with the value 'CLASS_FLD' and a magnifying glass icon; '*Field Action' with a dropdown menu showing 'Add'; and 'Field Value' with the value '00002' and a magnifying glass icon. At the bottom left of the form is an 'Add' button.

Request ID defaults to NEXT

SetID enter STATE

Field Name select CLASS_FLD from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (5 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Class Code ChartField Request** page opens:

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone 802/828-0678
*Business Unit 01110

SetID STATE
Field Name CLASS_FLD
*Field Value 00002
Email ID john.becker@vermont.gov

Core Information

*Effective Date 01/29/2019
*Status Active
*Description Test Class
*Short Description Test
Long Description

Business Justification

Attachments (0)

Request Comments

Questions

*1. What is the reason for the new or updated Class code?
Answer

*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer

3. Any additional comments about this request?
Answer

Trees

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the **long Description** link – this is an optional field where you can add any additional information about the Class Code that the requestor believes is important, for example a full description of the purpose for the code.

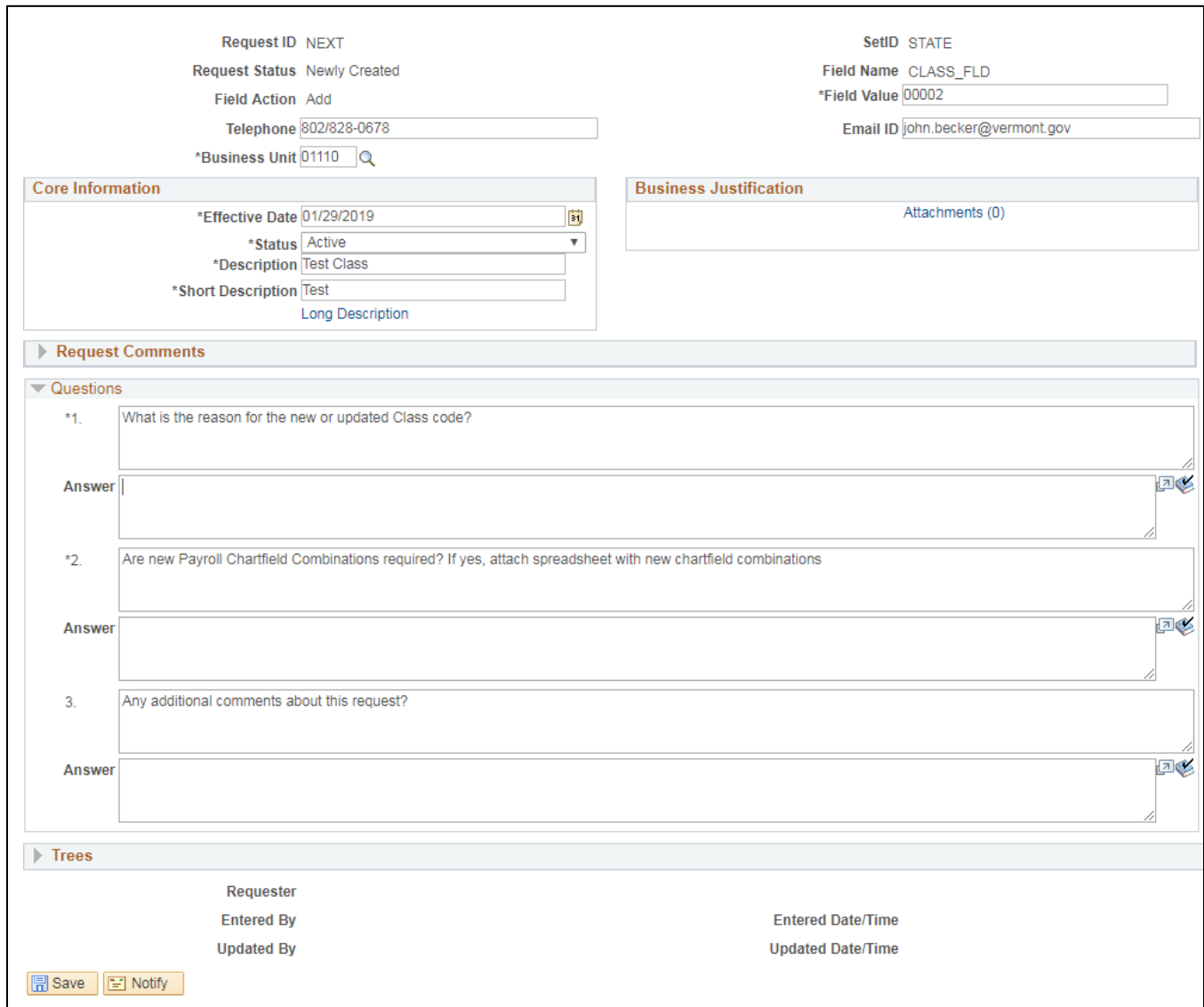
Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.



The screenshot shows a section titled "Request Comments" with a large, empty text area for entering comments. There is a small icon in the top right corner of the text area.

The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the three questions and click **Save**:



The screenshot displays a comprehensive request form. At the top, it includes fields for "Request ID" (NEXT), "Request Status" (Newly Created), "Field Action" (Add), "Telephone" (802/828-0678), and "*Business Unit" (01110). On the right, there are fields for "SetID" (STATE), "Field Name" (CLASS_FLD), "*Field Value" (00002), and "Email ID" (john.becker@vermont.gov). Below these are two main sections: "Core Information" and "Business Justification". The "Core Information" section contains fields for "*Effective Date" (01/29/2019), "*Status" (Active), "*Description" (Test Class), and "*Short Description" (Test). The "Business Justification" section has a link for "Attachments (0)". A "Request Comments" section is also present. Below this is a "Questions" section with three numbered questions and their corresponding answer fields. The first question is "What is the reason for the new or updated Class code?", the second is "Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations", and the third is "Any additional comments about this request?". At the bottom, there is a "Trees" section with fields for "Requester", "Entered By", "Updated By", "Entered Date/Time", and "Updated Date/Time". Finally, there are "Save" and "Notify" buttons at the very bottom.

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 0000000068	SetID STATE Copy
Request Status Newly Created	Field Name CLASS_FLD
Field Action Add	*Field Value 00002
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 Q	
Core Information	Business Justification
*Effective Date 01/29/2019 BY	Attachments (0)
*Status Active ▼	
*Description Test Class	
*Short Description Test	
Long Description	

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 0000000068	SetID STATE Copy
Request Status Newly Created	Field Name CLASS_FLD
Field Action Add	*Field Value 00002
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 Q	
Core Information	Business Justification
*Effective Date 01/29/2019 BY	Attachments (0)
*Status Active ▼	
*Description Test Class	
*Short Description Test	
Long Description	
Request Comments	
Questions	
Trees	
Request Action Submit for Approval ▼	Go
Requester	
Entered By JBECKER John M Becker	Entered Date/Time 01/30/2019 10:30AM
Updated By JBECKER John M Becker	Updated Date/Time 01/30/2019 10:30AM
Save Notify	

Click on the [View Approval Flow](#) link to see approval routing:

*Business Unit01110

Core Information

*Effective Date01/29/2019

*StatusActive

*DescriptionTest Class

*Short DescriptionTest

Long Description

Business Justification

Attachments (0)

Request Comments

Questions

Trees

Request ActionGoView Approval Flow

RequesterJBECKERJohn M Becker

Entered ByJBECKERJohn M BeckerEntered Date/Time01/30/2019 10:30AM

Updated ByJBECKERJohn M BeckerUpdated Date/Time01/30/2019 10:34AM

SaveReturn to SearchNotify

The [Approval Flow](#) box opens, click the [Multiple Approvers](#) link to see who can approve your request:

Approval Flow

Field Request Approval Stage

Request ID 0000000007:Pending

View/Hide Comments

Start New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

Approver #1

Name:Peggy Brooks

Description:Peggy Brooks

Approver #2

Name:Collins,Nancy E

Description:Collins,Nancy E

Approver #3

Name:Karen C Jaquish

Description:Karen C Jaquish

Approver #4

Name:Joe Harris

Description:Joe Harris

Approver #5

Name:Becker,John M

Description:Becker,John M

Approver #6

Name:Daniel D Shepard

Description:Daniel D Shepard

Close

Completing a ChartField Request Form for a Dept ID

Situations where this form is used: When you need to add, update, or inactivate a Dept ID.

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:

The screenshot shows the 'ChartField Request' page. At the top left is the title 'ChartField Request'. Below it is the section 'Add a New Value'. In the top right corner of this section is a button labeled 'Find an Existing Value' with a magnifying glass icon. The main form area contains several fields: '*Request ID' with the value 'NEXT'; '*SetID' with the value 'STATE' and a magnifying glass icon; '*Field Name' with the value 'DEPTID' and a magnifying glass icon; '*Field Action' with a dropdown menu showing 'Add'; and 'Field Value' with the value '0111000000' and a magnifying glass icon. At the bottom left of the form is an 'Add' button.

Request ID defaults to NEXT

SetID enter STATE

Field Name select DEPTID from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (10 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **DEPT ID ChartField Request** page opens:

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	DEPTID
Field Action	Add	*Field Value	1110002026
Telephone	<input type="text"/>		
*Business Unit	<input type="text"/>		
Core Information		Business Justification	
*Effective Date	01/30/2019	*Dept ID Level	<input type="text"/>
*Status	Active	*Detail Dept ID Roll-up	<input type="text"/>
*Description	<input type="text"/>		
*Short Description	<input type="text"/>		
	Long Description		
	Attributes		
Request Comments			
Questions			
*1.	What is the reason for the new or changed Dept ID?		
Answer	<input type="text"/>		
*2.	Will employee positions be assigned to this Dept ID in VTHR?		
Answer	<input type="text"/>		
*3.	Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations		
Answer	<input type="text"/>		
4.	Any additional comments about this request?		
Answer	<input type="text"/>		
Trees			

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

Description – Enter a description (up to 30 characters)

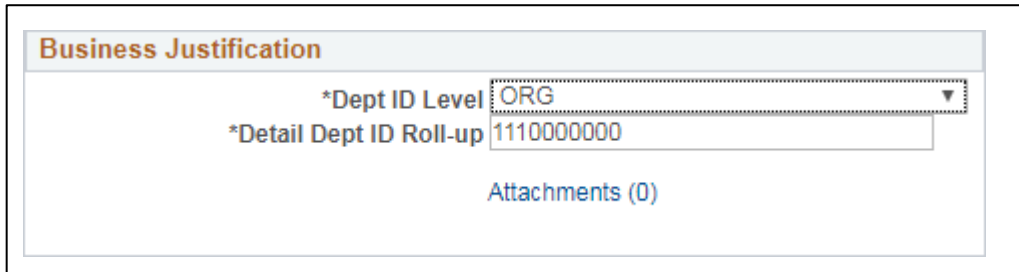
Short Description – Enter a short description (up to 10 characters)

Long Description – Click the [long Description](#) link – this is an optional field where you can add any additional information about the Dept ID that the requestor believes is important, for example a full description of the purpose for the Dept ID.

Attributes – Leave blank - only used by VISION Financial Operations

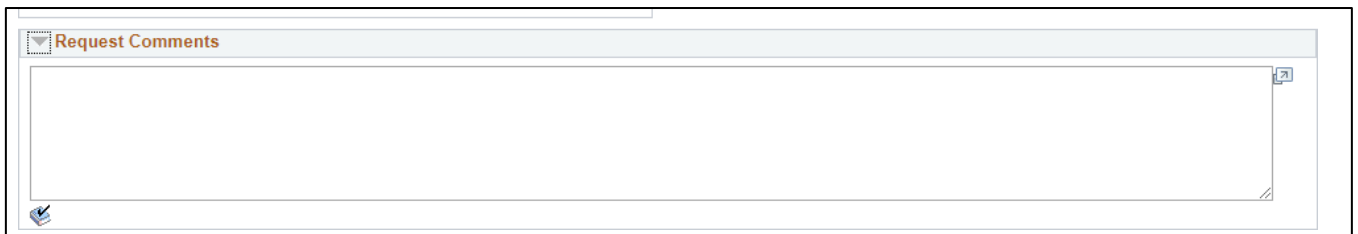
Dept ID Level – Select ‘Approp’, ‘Detail’, or ‘ORG’

Detail Dept ID Roll-up – Enter the roll-up Dept ID, if “Approp’ is selected for the level, the roll- up Dept ID should be the same as the requested Dept ID



The screenshot shows a form section titled "Business Justification" in orange text. Below the title, there are two fields: "*Dept ID Level" with a dropdown menu showing "ORG" and a downward arrow, and "*Detail Dept ID Roll-up" with a text input field containing "1110000000". Below these fields is a link that says "Attachments (0)" in blue text.

Request Comments – Expand the [Request Comments](#) box – this is an optional field to add any relevant comments.



The screenshot shows a form section titled "Request Comments" in orange text. Below the title is a large, empty text area for entering comments. There is a small icon in the bottom left corner of the text area and a small icon in the bottom right corner.

The [Attachments](#) link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the four questions and click [Save](#):

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	DEPTID
Field Action	Add	*Field Value	1110002026
Telephone	<input type="text"/>	Email ID	john.becker@vermont.gov
*Business Unit	<input type="text"/>		

Core Information

*Effective Date

01/30/2019

*Status

Active

*Description

*Short Description

Long Description

Attributes

Business Justification

*Dept ID Level

*Detail Dept ID Roll-up

Attachments (0)

Request Comments

Questions

*1.

What is the reason for the new or changed Dept ID?

Answer

*2.

Will employee positions be assigned to this Dept ID in VTNR?

Answer

*3.

Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations

Answer

4.

Any additional comments about this request?

Answer

Trees

Request Action

Go

Requester

Entered By

JBECKER

John M Becker

Entered Date/Time

01/30/2019 11:00AM

Updated By

JBECKER

John M Becker

Updated Date/Time

01/30/2019 11:00AM

Save

Notify

The [Trees](#) box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 000000069	SetID STATE Copy
Request Status Newly Created	Field Name DEPTID
Field Action Add	*Field Value 1110002026
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	*Dept ID Level ORG <input type="text"/>
*Status Active <input type="text"/>	*Detail Dept ID Roll-up 1110000000 <input type="text"/>
*Description TEST DEPT ID <input type="text"/>	Attachments (0)
*Short Description TEST <input type="text"/>	
Long Description <input type="text"/>	
Attributes <input type="text"/>	

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 000000069	SetID STATE Copy
Request Status Newly Created	Field Name DEPTID
Field Action Add	*Field Value 1110002026
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 <input type="text"/>	
Core Information	Business Justification
*Effective Date 01/30/2019 <input type="text"/>	*Dept ID Level ORG <input type="text"/>
*Status Active <input type="text"/>	*Detail Dept ID Roll-up 1110000000 <input type="text"/>
*Description TEST DEPT ID <input type="text"/>	Attachments (0)
*Short Description TEST <input type="text"/>	
Long Description <input type="text"/>	
Attributes <input type="text"/>	
Request Comments	
Questions	
Trees	
Request Action <input type="text"/>	Go
Requester	
Entered By JBECKER John M Becker	Entered Date/Time 01/30/2019 11:00AM
Updated By JBECKER John M Becker	Updated Date/Time 01/30/2019 11:00AM

Click on the [View Approval Flow](#) link to see approval routing:

*Business Unit 01110

Core Information	Business Justification
*Effective Date 01/30/2019 *Status Active *Description TEST DEPT ID *Short Description TEST Long Description Attributes	*Dept ID Level ORG *Detail Dept ID Roll-up 1110000000 Attachments (0)

Request Comments
Questions
Trees

Request Action
Go
View Approval Flow

Requester JBECKER John M Becker
Entered By JBECKER John M Becker
Updated By JBECKER John M Becker
Entered Date/Time 01/30/2019 11:00AM
Updated Date/Time 01/30/2019 11:04AM

Save Return to Search Notify

The [Approval Flow](#) box opens, click the [Multiple Approvers](#) link to see who can approve your request:

Approval Flow

Field Request Approval Stage

Request ID 000000007:Pending View/Hide Comments Start New Path

Path for Fields Approval

Pending
Multiple Approvers
Chartfield FINOPS Approvers

Comments

Return

Approver #1
Name: Peggy Brooks Description: Peggy Brooks
Approver #2
Name: Collins,Nancy E Description: Collins,Nancy E
Approver #3
Name: Karen C Jaquish Description: Karen C Jaquish
Approver #4
Name: Joe Harris Description: Joe Harris
Approver #5
Name: Becker,John M Description: Becker,John M
Approver #6
Name: Daniel D Shepard Description: Daniel D Shepard

Close

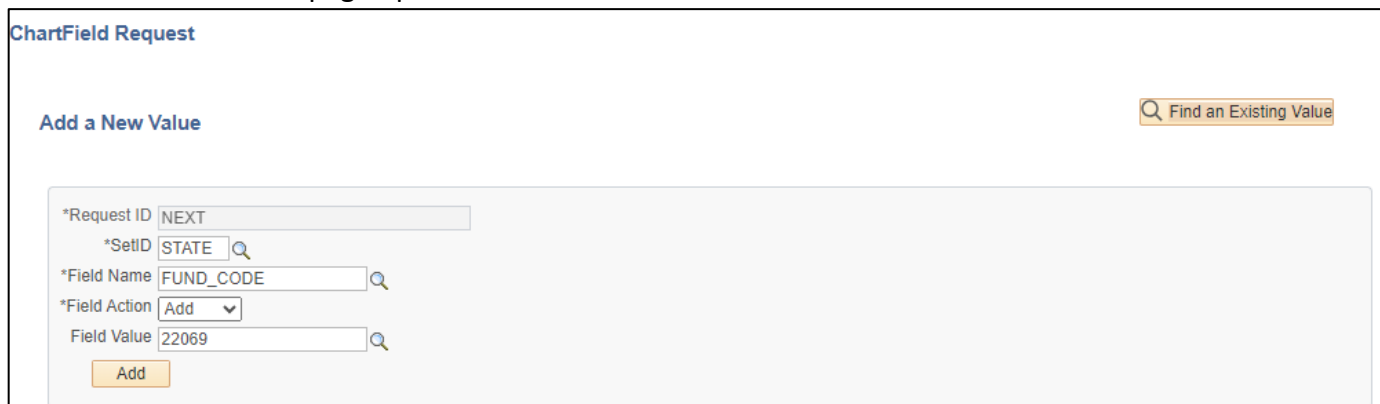
Completing a ChartField Request Form for a Fund Code

Situations where this form is used: When you need to add, modify, or inactivate a Fund Code

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:



The screenshot shows the 'ChartField Request' page. At the top left is the title 'ChartField Request'. Below it is the section 'Add a New Value'. In the top right corner of this section is a button labeled 'Find an Existing Value' with a magnifying glass icon. The main form area contains several fields: '*Request ID' with the value 'NEXT', '*SetID' with the value 'STATE' and a magnifying glass icon, '*Field Name' with the value 'FUND_CODE' and a magnifying glass icon, '*Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value '22069' and a magnifying glass icon. At the bottom left of the form is an 'Add' button.

Request ID defaults to NEXT

SetID enter STATE

Field Name select FUND_CODE from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (5 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Fund Code ChartField Request** page opens:

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	FUND_CODE
Field Action	Add	*Field Value	22069
Telephone	<input type="text"/>	Email ID	john.becker@vermont.gov
*Business Unit	<input type="text"/>		

Core Information

*Effective Date

01/30/2019

*Status

Active

*Description

*Short Description

Long Description

Attributes

Business Justification

Attachments (0)

Request Comments

Questions

*1.

Is there a Statute or Act creating or changing this Fund? Please provide the Statute or Act, if applicable.

Answer

*2.

What authorizes the budget for this fund? (Appropriation Act, Excess Receipts, Demand Driven)

Answer

*3.

What is the authorized uses for the Fund?

Answer

*4.

What is the revenue sources for the Fund?

Answer

*5.

Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations

Answer

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select 'Active' or 'Inactive' as appropriate

Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

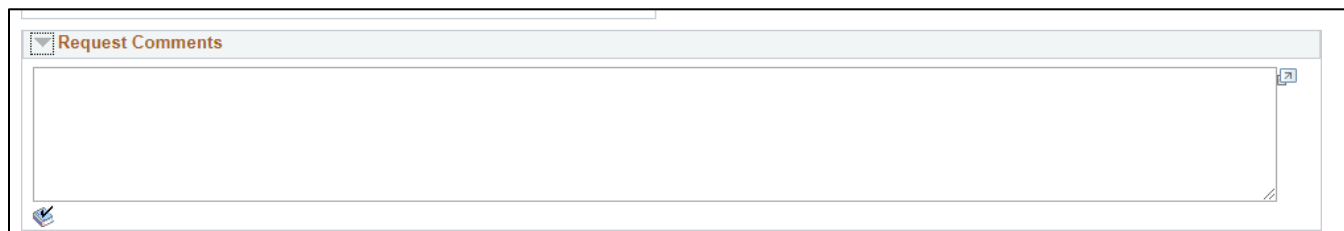
Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the [long Description](#) link – this is an optional field where you can add any additional information about the Fund Code that the requestor believes is important, for example a statute reference, or full name that can't fit in the Description box due to the limit of 30 characters.

Attributes – Leave blank - only used by VISION Financial Operations

Request Comments – Expand the [Request Comments](#) box – this is an optional field to add any relevant comments.

A screenshot of a software interface showing a 'Request Comments' section. The section has a light blue header bar with the text 'Request Comments' in orange. Below the header is a large, empty white rectangular area for text input. In the bottom-left corner of the input area, there is a small icon of a document with a pencil. In the bottom-right corner, there is a small icon of a document with a magnifying glass.

The [Attachments](#) link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the six questions and click **Save**:

Questions	
*1.	Is there a Statute or Act creating or changing this Fund? Please provide the Statute or Act, if applicable.
Answer	<div></div>
*2.	What authorizes the budget for this fund? (Appropriation Act, Excess Receipts, Demand Driven)
Answer	<div></div>
*3.	What is the authorized uses for the Fund?
Answer	<div></div>
*4.	What is the revenue sources for the Fund?
Answer	<div></div>
*5.	Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer	<div></div>
6.	Any additional comments about this request?
Answer	<div></div>

Trees

Requester

Entered By

Updated By

Entered Date/Time

Updated Date/Time

Save

Notify

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID 0000000070	SetID STATE Copy
Request Status Newly Created	Field Name FUND_CODE
Field Action Add	*Field Value 22069
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 Q	

Core Information
*Effective Date 01/30/2019 BT
*Status Active ▼
*Description Test Fund
*Short Description TEST
Long Description
Attributes

Business Justification
Attachments (0)

► Request Comments

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID 0000000070	SetID STATE Copy
Request Status Newly Created	Field Name FUND_CODE
Field Action Add	*Field Value 22069
Telephone 802/828-0678	Email ID john.becker@vermont.gov
*Business Unit 01110 Q	

Core Information
*Effective Date 01/30/2019 BT
*Status Active ▼
*Description Test Fund
*Short Description TEST
Long Description
Attributes

Business Justification
Attachments (0)

► Request Comments

► Questions

► Trees

Request Action Submit for Approval ▼ Go

Requester		
Entered By	JBECKER	John M Becker
Updated By	JBECKER	John M Becker

Entered Date/Time	01/30/2019 11:24AM
Updated Date/Time	01/30/2019 11:24AM

Click on the **View Approval Flow** link to see approval routing:

*Business Unit 01110

Core Information	Business Justification
*Effective Date 01/30/2019 *Status Active *Description Test Fund *Short Description TEST Long Description Attributes	Attachments (0)

Request Comments

Questions

Trees

Request Action View Approval Flow

Requester JBECKER John M Becker
Entered By JBECKER John M Becker
Updated By JBECKER John M Becker

Entered Date/Time 01/30/2019 11:24AM
Updated Date/Time 01/30/2019 11:25AM

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

Approval Flow

Field Request Approval Stage

Request ID 0000000007: Pending

Path for Fields Approval

Pending
Multiple Approvers
Chartfield FINOPS Approvers

Comments

Approver #1
Name: Peggy Brooks Description: Peggy Brooks
Approver #2
Name: Collins, Nancy E Description: Collins, Nancy E
Approver #3
Name: Karen C Jaquish Description: Karen C Jaquish
Approver #4
Name: Joe Harris Description: Joe Harris
Approver #5
Name: Becker, John M Description: Becker, John M
Approver #6
Name: Daniel D Shepard Description: Daniel D Shepard

Completing a ChartField Request Form for a Program Code

Situations where this form is used: When you need to add, update, or inactivate a Program Code

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:

The screenshot shows the 'ChartField Request' page with the 'Add a New Value' section. In the top right corner, there is a button labeled 'Find an Existing Value'. The main form area contains several input fields: '*Request ID' with the value 'NEXT', '*SetID' with the value 'STATE' and a search icon, '*Field Name' with the value 'PROGRAM_CODE' and a search icon, '*Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value 'PROG3' and a search icon. At the bottom left of the form area is an 'Add' button.

Request ID defaults to NEXT

SetID enter STATE

Field Name select PROGRAM_CODE from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (5 characters)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Program Code ChartField Request** page opens:

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	PROGRAM_CODE
Field Action	Add	*Field Value	PROG3
Telephone	<input type="text"/>		
*Business Unit	<input type="text"/>		

Core Information
*Effective Date
*Status
*Description
*Short Description
[Long Description](#)

Business Justification
[Attachments \(0\)](#)

Request Comments
Questions
*1. What is the reason for the new or updated Program code?
Answer
*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer
3. Any additional comments about this request?
Answer

Trees
Requester
Entered By
Updated By
Entered Date/Time
Updated Date/Time

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Effective Date – Enter the effective date for the chartfield

Status – Select ‘Active’ or ‘Inactive’ as appropriate

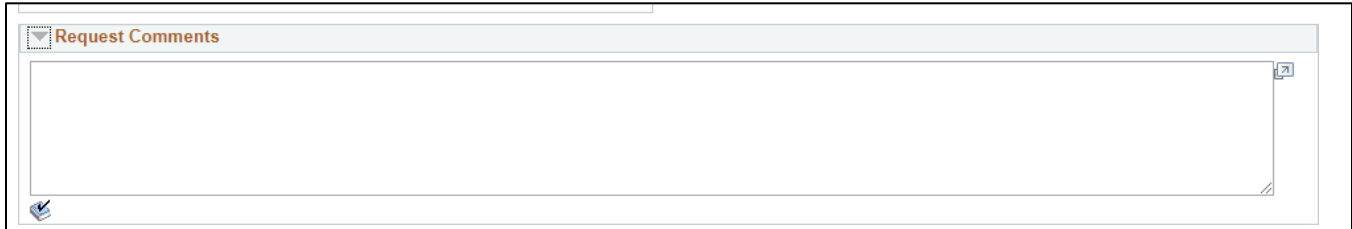
Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

Description – Enter a description (up to 30 characters)

Short Description – Enter a short description (up to 10 characters)

Long Description – Click the [long Description](#) link – this is an optional field where you can add any additional information about the Program Code that the requestor believes is important, for example a full description of the purpose for the code.

Request Comments – Expand the [Request Comments](#) box – this is an optional field to add any relevant comments.

A screenshot of a web form interface. At the top, there is a tab labeled 'Request Comments' with a small downward arrow icon to its left. Below the tab is a large, empty rectangular text area for entering comments. In the bottom-left corner of the text area, there is a small blue icon of a document with a checkmark. In the bottom-right corner, there is a small icon of a document with a plus sign.

The [Attachments](#) link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the three questions below:

Questions 3 – Requires a response for all AHS departments for all program code chartfield requests. The question response field should indicate the program code was reviewed and determined to either 1) not require an AHS Program Report tree node, or 2) Does require an AHS Program Report Tree Node for CMIA Draw Queries. If the program code does need to be on the AHS Program Report Tree, the requestor should indicate the Tree Node the Program Code should be inserted below. For nodes with a child node, the child node should be identified when setting up the new program code.

Sample Response AHS: Question 3. Answer – The program code should be added under child node VR Section 110.

Click [Save](#):

<p>Request ID NEXT</p> <p>Request Status Newly Created</p> <p>Field Action Add</p> <p>Telephone <input style="width: 150px;" type="text"/></p> <p>*Business Unit <input style="width: 50px;" type="text"/> </p>	<p>SetID STATE</p> <p>Field Name PROGRAM_CODE</p> <p>*Field Value <input style="width: 150px;" type="text" value="PROG3"/></p> <p>Email ID <input style="width: 150px;" type="text" value="john.becker@vermont.gov"/></p>						
<p>Core Information</p> <p>*Effective Date <input style="width: 100px;" type="text" value="01/30/2019"/> </p> <p>*Status <input style="width: 50px;" type="text" value="Active"/> ▼</p> <p>*Description <input style="width: 150px;" type="text"/></p> <p>*Short Description <input style="width: 150px;" type="text"/></p> <p style="text-align: right;">Long Description</p>	<p>Business Justification</p> <p style="text-align: right;">Attachments (0)</p>						
<p>► Request Comments</p>							
<p>▼ Questions</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>*1. What is the reason for the new or updated Program code?</p> <p>Answer <input style="width: 100%; height: 40px;" type="text"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>*2. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations</p> <p>Answer <input style="width: 100%; height: 40px;" type="text"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>3. Any additional comments about this request?</p> <p>Answer <input style="width: 100%; height: 40px;" type="text"/></p> </div>							
<p>► Trees</p>							
<table style="width: 100%;"> <tr> <td style="width: 33%;">Requester</td> <td style="width: 33%;">Entered Date/Time</td> </tr> <tr> <td>Entered By</td> <td>Updated Date/Time</td> </tr> <tr> <td>Updated By</td> <td></td> </tr> </table> <p> Save Notify</p>		Requester	Entered Date/Time	Entered By	Updated Date/Time	Updated By	
Requester	Entered Date/Time						
Entered By	Updated Date/Time						
Updated By							

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

<p>Request ID 0000000071</p> <p>Request Status Newly Created</p> <p>Field Action Add</p> <p>Telephone <input style="width: 150px;" type="text" value="802/828-0678"/></p> <p>*Business Unit <input style="width: 50px;" type="text" value="01110"/> </p>	<p>SetID STATE </p> <p>Field Name PROGRAM_CODE</p> <p>*Field Value <input style="width: 150px;" type="text" value="PROG3"/></p> <p>Email ID <input style="width: 150px;" type="text" value="john.becker@vermont.gov"/></p>
<p>Core Information</p> <p>*Effective Date <input style="width: 100px;" type="text" value="01/30/2019"/> </p> <p>*Status <input style="width: 50px;" type="text" value="Active"/> ▼</p> <p>*Description <input style="width: 150px;" type="text" value="Test Program"/></p> <p>*Short Description <input style="width: 150px;" type="text" value="Test"/></p> <p style="text-align: right;">Long Description</p>	<p>Business Justification</p> <p style="text-align: right;">Attachments (0)</p>
<p>► Request Comments</p>	

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID	000000071	SetID	STATE	Copy
Request Status	Newly Created	Field Name	PROGRAM_CODE	
Field Action	Add	*Field Value	PROG3	
Telephone	802/828-0678	Email ID	john.becker@vermont.gov	
*Business Unit	01110			

Core Information

*Effective Date

01/30/2019

*Status

Active

*Description

Test Program

*Short Description

Test

[Long Description](#)

Business Justification

Attachments (0)

[Request Comments](#)

[Questions](#)

[Trees](#)

Request Action

Submit for Approval

[Go](#)

Requester

JBECKER

John M Becker

Entered Date/Time

01/30/2019 11:34AM

Entered By

JBECKER

John M Becker

Updated Date/Time

01/30/2019 11:34AM

Click on the **View Approval Flow** link to see approval routing:

*Business Unit	01110	
----------------	-------	--

Core Information

*Effective Date

01/30/2019

*Status

Active

*Description

Test Program

*Short Description

Test

[Long Description](#)

Business Justification

Attachments (0)

[Request Comments](#)

[Questions](#)

[Trees](#)

Request Action

[Go](#)

[View Approval Flow](#)

Requester

JBECKER

John M Becker

Entered Date/Time

01/30/2019 11:34AM

Entered By

JBECKER

John M Becker

Updated Date/Time

01/30/2019 11:35AM

Updated By

JBECKER

John M Becker

[Save](#)

[Return to Search](#)

[Notify](#)

[Add](#)

The **Approval Flow** box opens, click the **Multiple Approvers** link to see who can approve your request:

Approval Flow

Help

Field Request Approval Stage

Request ID 0000000007:Pending

View/Hide Comments

Start New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker,John M
Description:	Becker,John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard
Close	

Completing a ChartField Request Form for a Project ID

Situations where this form is used: When you need to add, update, or inactivate a Project ID

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields
> Define Values > ChartField Request

The **Add a New Value** page opens:

The screenshot shows the 'ChartField Request' page. At the top left is the title 'ChartField Request'. Below it is the section 'Add a New Value'. In the top right corner of this section is a button labeled 'Find an Existing Value'. The main form area contains several fields: '*Request ID' with the value 'NEXT', '*SetID' with the value 'STATE' and a magnifying glass icon, '*Field Name' with the value 'PROJECT_ID' and a magnifying glass icon, '*Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value 'TESTPROJECTID1' and a magnifying glass icon. At the bottom left of the form area is an 'Add' button.

Request ID defaults to NEXT

SetID enter your department specific SetID, normally your business unit

Field Name select PROJECT_ID from the list of options

Field Action select from the drop-down menu

- Options are Add or Update

Field Value enter the value you want to add or update (15 characters max)

- Finance and Management reserves the right to change the value to comply with VISION's numbering convention

Click **Add**

The **Project ID ChartField Request** page opens:

Request ID	NEXT	SetID	01110
Request Status	Newly Created	Field Name	PROJECT_ID
Field Action	Add	*Field Value	TESTPROJECTID1
Telephone	<input type="text"/>	Email ID	john.becker@vermont.gov
*Business Unit	<input type="text"/>		

Core Information
*End Date
*Start Date
*Status
*Description

Business Justification
Attachments (0)

Request Comments

Questions
*1. Will this project have a funding source controlled budget?
Answer
*2. What is the Employee ID of the Project Manager?
Answer
*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer
4. Any additional comments about this request?
Answer

Trees

Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

End Date – Enter the end date for the Project ID; or default 06/30/2099

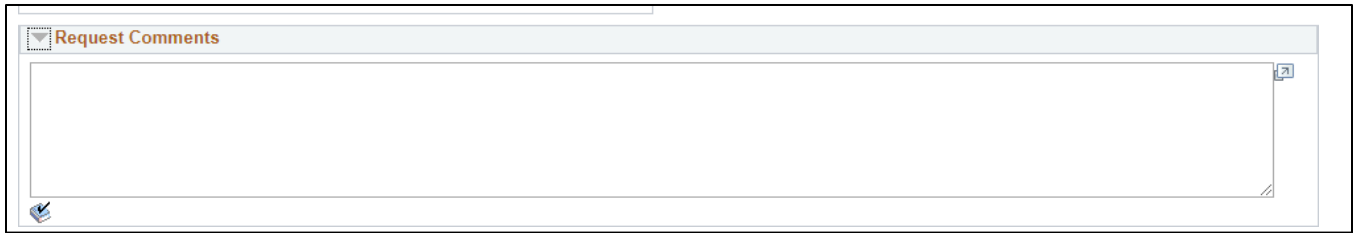
Start Date – Enter the start date for the Project ID

Status – Select ‘Active’ or ‘Inactive’ as appropriate

Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

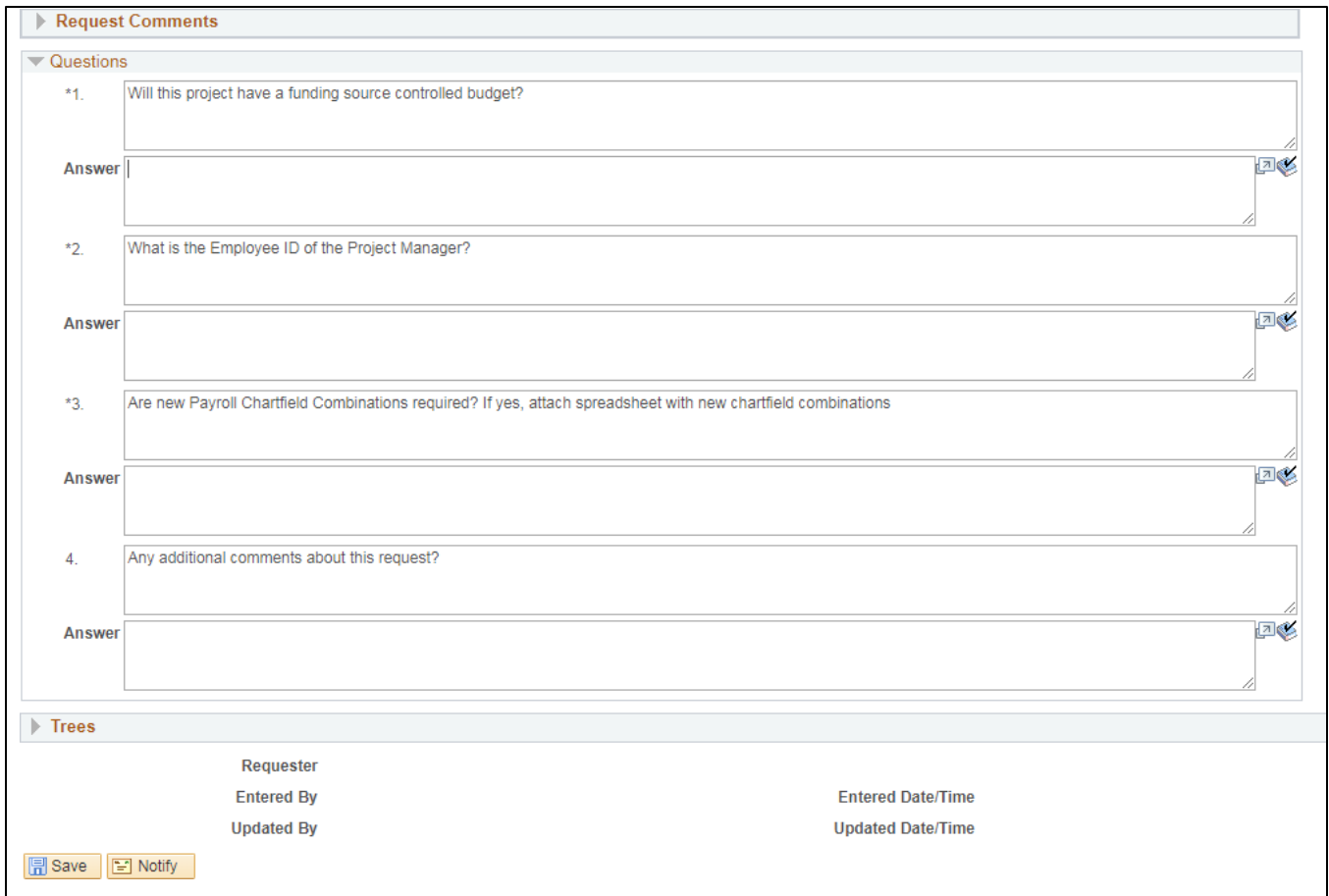
Description – Enter a description (up to 30 characters)

Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.

A screenshot of a software interface showing a 'Request Comments' section. It has a light blue header with a dropdown arrow and the text 'Request Comments'. Below the header is a large, empty white text area with a small icon in the bottom right corner. A small blue icon is visible in the bottom left corner of the section.

The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

Answer the four questions and click **Save**:

A screenshot of a software interface showing two sections: 'Request Comments' and 'Trees'. The 'Request Comments' section has a light blue header and a dropdown arrow. Below it, there are four questions, each with an 'Answer' field. The questions are: 1. 'Will this project have a funding source controlled budget?', 2. 'What is the Employee ID of the Project Manager?', 3. 'Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations', and 4. 'Any additional comments about this request?'. Each question has a corresponding 'Answer' field with a small icon in the bottom right corner. The 'Trees' section is below the questions and has a light blue header with a dropdown arrow. Below the header, there are four labels: 'Requester', 'Entered By', 'Updated By', and 'Entered Date/Time'. At the bottom of the 'Trees' section, there are two buttons: 'Save' and 'Notify'.

The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

Your request has been assigned a **Request ID** number:

Request ID	0000000072	SetID	01110	Copy
Request Status	Newly Created	Field Name	PROJECT_ID	
Field Action	Add	*Field Value	TESTPROJECTID1	
Telephone	802/828-0678	Email ID	john.becker@vermont.gov	
*Business Unit	01110			

Core Information

*End Date	01/31/2022	B1
*Start Date	01/30/2019	B1
*Status	Active	▼
*Description	Test Project ID	

Business Justification

[Attachments \(0\)](#)

[Request Comments](#)

Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

Request ID	0000000072	SetID	01110	Copy
Request Status	Newly Created	Field Name	PROJECT_ID	
Field Action	Add	*Field Value	TESTPROJECTID1	
Telephone	802/828-0678	Email ID	john.becker@vermont.gov	
*Business Unit	01110			

Core Information

*End Date	01/31/2022	B1
*Start Date	01/30/2019	B1
*Status	Active	▼
*Description	Test Project ID	

Business Justification

[Attachments \(0\)](#)

[Request Comments](#)

[Questions](#)

[Trees](#)

Request Action: Submit for Approval ▼ [Go](#)

Requester

Entered By JBECKER John M Becker Entered Date/Time 01/30/2019 11:51AM

Updated By JBECKER John M Becker Updated Date/Time 01/30/2019 11:51AM

[Save](#) [Notify](#)

Click on the [View Approval Flow](#) link to see approval routing:

*Business Unit 01110

Core Information	Business Justification
*End Date 01/31/2022 *Start Date 01/30/2019 *Status Active *Description Test Project ID	Attachments (0)

Request Comments

Questions

Trees

Request Action [View Approval Flow](#)

Requester JBECKER John M Becker
Entered By JBECKER John M Becker
Updated By JBECKER John M Becker

Entered Date/Time 01/30/2019 11:51AM
Updated Date/Time 01/30/2019 11:51AM

The [Approval Flow](#) box opens, click the [Multiple Approvers](#) link to see who can approve your request:

Approval Flow

Field Request Approval Stage

Request ID 0000000007: Pending [View/Hide Comments](#) [Start New Path](#)

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Approver #1	
Name:	Peggy Brooks
Description:	Peggy Brooks
Approver #2	
Name:	Collins, Nancy E
Description:	Collins, Nancy E
Approver #3	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
Approver #4	
Name:	Joe Harris
Description:	Joe Harris
Approver #5	
Name:	Becker, John M
Description:	Becker, John M
Approver #6	
Name:	Daniel D Shepard
Description:	Daniel D Shepard

Adding an Attachment to a ChartField Request

When to use: Adding an attachment while creating a chartfield request

Click the **Attachments** link – this is an optional field used to attach relevant files to the request.

The screenshot shows a web form for creating a ChartField request. At the top, there are fields for Request ID (NEXT), Request Status (Newly Created), Field Action (Add), Telephone (802/828-0678), *Business Unit (01110), SetID, STATE, Field Name (ACCOUNT), *Field Value (551003), and Email ID (john.becker@vermont.gov). Below these are two main sections: Core Information and Business Justification. The Core Information section includes checkboxes for Control Account and Statistical Account, *Effective Date (01/29/2019), *Status (Active), Monetary Account Type (E), Unit of Measure, *Description (Test Account), and *Short Description (TestAcct). The Business Justification section has a link labeled "Attachments (0)" which is highlighted with a red rectangle.

The **Request Attachments** page opens, Click the **Add Attachment** button:

The screenshot shows the "Request Attachments" page. At the top, there is a "Request ID" field with the value "NEXT". Below this is a table with columns: File Name, Show to Approver?, Description, User, Name, and Date/Time Stamp. The table has one row with the value "View" in the "File Name" column and a checked box in the "Show to Approver?" column. Below the table, there is a message: "Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments." At the bottom, there is a button labeled "Add Attachment" which is highlighted with a red rectangle, and two buttons labeled "OK" and "Cancel".

Click **Browse**, select your document and click **Upload**:

The screenshot shows a "File Attachment" dialog box. It has a "Choose File" button and a text field that says "No file chosen". Below these are two buttons: "Upload" and "Cancel". The "Upload" button is highlighted with a red rectangle.

Add a **Description** and click **OK**:

Request Attachments

Request ID: NEXT

Details

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
Upload_Test.docx	<input checked="" type="checkbox"/>	Test Document			

Adding large attachments can take some time to upload. Therefore, it is advised to save the transaction before adding large attachments.

Add Attachment

OK Cancel

The **Attachment** counter now shows 1 attachment:

Request ID: NEXT

Request Status: Newly Created

Field Action: Add

Telephone:

*Business Unit: 02100

SetID: STATE

Field Name: ACCOUNT

*Field Value: CF40XA

Email ID: eric.hoefel@vermont.gov

Core Information

☐ Control Account

☐ Statistical Account

*Effective Date: 07/01/2018

*Status: Active

Monetary Account Type: R

Unit of Measure:

*Description: Test Account

*Short Description: TestAcct

Long Description:

Business Justification

Attachments (1)

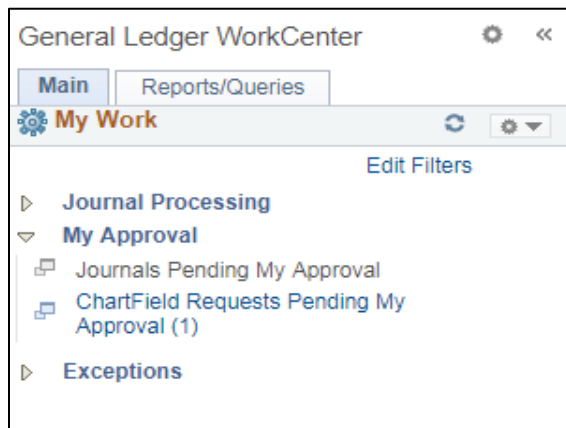
Department Level Approval of a ChartField Request Form

Situations where this is used: If a department has requested to have users set up in VISION as department level approvers, after a Chartfield Request Form is submitted by the requestor, VISION workflow routes it to a designated department Approver or a group of designated Approvers for review and approval. After the department level of approval, the request is routed to Finance and Management for final approval to be added to VISION.

WorkCenter navigation: General Ledger WorkCenter > My Work pagelet > My Approval > Chartfield Requests Pending My Approval

or

Navigator Menu navigation: Worklist > Worklist



If there is a number after the Chartfield Requests Pending My Approval, that means there are requests to be processed.

Click on link to review the Chartfield request

The screenshot displays the 'ChartField Requests Pending My Approval' page. It includes a 'Comments' section, a 'Business Requests' section with a table, and a 'Request Details' section. The table lists one request with ID 0000000058, SetID STATE, Field Name DEPTID, Field Action Add, and Field Value 1100000004. The page also features 'Approve', 'Deny', 'Hold', and 'Pushback' buttons.

Select	Request ID	SetID	Field Name	Field Action	Field Value	Attachments (0)
<input type="checkbox"/>	0000000058	STATE	DEPTID	Add	1100000004	

Click on the Request ID link to review the request Page

ChartField Request Approval

Request ID 0000000058
Request Status Pending Approval
Field Action Add
Telephone 802/828-0678
*Business Unit 01100

SetID STATE
Field Name DEPTID
*Field Value 1100000004
Email ID vision.expctestwf@vermont.gov

Core Information
*Effective Date 01/29/2019
*Status Active
*Description TestDeptID
*Short Description Test
[Long Description](#)
[Attributes](#)

Business Justification
*Dept ID Level ORG
*Detail Dept ID Roll-up 1100000000

► Request Comments

▼ Questions

*1. What is the reason for the new or changed Dept ID?
Answer Test

*2. Will employee positions be assigned to this Dept ID in VTHR?
Answer Test

*3. Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations
Answer Test

4. Any additional comments about this request?
Answer Test

Review the Chartfield Request Form for the items entered.

Refer to the examples in this manual for the various chartfields to ensure the form is correctly completed.

Items to consider during your review:

- Is the new or updated chartfield required?
- Is the Business Unit correct?
- Is the chartfield value correct?
- Is the description provided accurate?
- Does the long description contain relevant information, such as a statute reference?
- Have all the questions been answered completely?

Once you have completed your review of the Chartfield request, scroll to the bottom of the page and click OK.

Now you have two options:

1. If you have determined the request is properly filled out, you can approve the request.
2. If you have determined the request needs to be sent back to the requestor for additional information, you can deny the request.

Approval of the Chartfield Request

Click the Select box for the Request ID you want to approve.

Comments are not required to approve the request, but if you want to add them you can by expanding the Comments box, enter comments, then click approve

If you don't want to add comments, you can just Click the approve button.

ChartField Requests Pending My Approval [Refine Filter Criteria](#)

Comments

To add comments to all selected business requests' approval processes, enter them and click the Add Comments button or any one of the three approval action buttons. Then the comments can be viewed via the View Approval Flow icon on the Business Requests grid for each business request.

Nice Job!

245 characters remaining

[Add Comments](#)

Select All / Deselect All [Approve](#) [Deny](#) [Hold](#) [Pushback](#)

Business Requests [Personalize](#) | [Find](#) | [Grid](#) | [First](#) | [1 of 1](#) | [Last](#)

[Request Details](#) [More Details](#) [Filter](#)

Select	Request ID	SetID	Field Name	Field Action	Field Value	Attachments
<input checked="" type="checkbox"/>	0000000058	STATE	DEPTID	Add	1100000004	Attachments (0)

Select All / Deselect All [Approve](#) [Deny](#) [Hold](#) [Pushback](#)

The request is now routed to Finance and Management for final approval to be added to VISION.

Denial of the Chartfield Request

Click the Select box for the Request ID you want to deny.

Comments are required to deny the request, click on the Comments box to expand, enter comments, then click Deny

ChartField Requests Pending My Approval
Refine Filter Criteria

Comments

To add comments to all selected business requests' approval processes, enter them and click the Add Comments button or any one of the three approval action buttons. Then the comments can be viewed via the View Approval Flow icon on the Business Requests grid for each business request.

Add the statute reference to the long description

205 characters remaining

Select All / Deselect All

Approve

Deny

Hold

Pushback

Business Requests

Personalize | Find | First 1 of 1 Last

Request Details

More Details

Select	Request ID	SetID	Field Name	Field Action	Field Value		
<input checked="" type="checkbox"/>	0000000058	STATE	DEPTID	Add	1100000004		Attachments (0)

Select All / Deselect All

Approve

Deny

Hold

Pushback

The request is now routed back to the requestor, where they can rework and resubmit it for approval or they can decide to cancel it.

To view Workflow

Click on the **View Approval Flow** link to see approval routing:

ChartField Requests Pending My Approval
Refine Filter Criteria

Comments

Select All / Deselect All

Approve

Deny

Hold

Pushback

Business Requests

Personalize | Find | First 1 of 1 Last

Request Details

More Details

Select	Request ID	SetID	Field Name	Field Action	Field Value		
<input checked="" type="checkbox"/>	0000000081	STATE	DEPTID	Add	1100000005		Attachments (0)

Select All / Deselect All

Approve

Deny

Hold

Pushback

The **Approval Flow** box opens, this shows the two levels of approval

Approval Flow

Field Request Approval Stage

Request ID 0000000081: Pending [View/Hide Comments](#) [Start New Path](#)

Path for Fields Approval

Pending [Multiple Approvers](#) [Chartfield Approvers](#) → Not Routed [Multiple Approvers](#) [Chartfield FINOPS Approvers](#)

Comments

Return

Under the Pending box click the [Multiple Approvers](#) link to see who can approve the request at the department.

https://fintraining.erp.vermont.gov/psc/FMTRN_9/EMP...

Approver #1

Name: Stephanie L Fuller
Description: Stephanie L Fuller

Approver #2

Name: Earl Stubin
Description: Earl Stubin

Close

Under the Not Routed box click the [Multiple Approvers](#) link to see who can approve the request after its approved by the department approvers.

https://fintraining.erp.vermont.gov/psc/FMTRN_8/EMP...

Approver #1

Name: Daniel D Shepard
Description: Daniel D Shepard

Approver #2

Name: John M Becker
Description: John M Becker

Approver #3

Name: Joe Harris
Description: Joe Harris

Approver #4

Name: Karen C Jaquish
Description: Karen C Jaquish

Approver #5

Name: Collins, Nancy E
Description: Collins, Nancy E

Approver #6

Name: Peggy Brooks
Description: Peggy Brooks

Close

Tracking a ChartField Request Status

When to use: To track the status of a chartfield request form you submitted

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request or

Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > ChartField Request

The **Add a New Value** page opens, click the **Find an Existing Value** tab:

Add a New ValueFind an Existing Value

*Request ID

*SetID

*Field Name

*Field Action

Field Value

Add

Set the **Request Status** field to blank and click **Search** then select the appropriate request:

ChartField RequestAdd a New Value

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches

Saved Searches

Request ID

*SetID

Field Name

Field Action

Field Value

Request Status

Requester

Entered By

Show fewer options

☐ Case Sensitive

Search

Clear

Save Search

Search Results

Only the first 100 results of a possible 1607 can be displayed. SetID "STATE", Field Action "Add"

View All | 21

First 1-10 of 100 Last

Request ID	SetID	Field Name	Field Action	Field Value	Request Status	Requester	Entered By	
0000000001	STATE	PROGRAM_CODE	Add	39108	Approved	KSYMONDS	KSYMONDS	>
0000000005	STATE	ACCOUNT	Add	200070	Denied	RCORNELL	RCORNELL	>
0000000033	STATE	DEPTID	Add	6140040700	Approved	PLAROSE	PLAROSE	>
0000000034	STATE	DEPTID	Add	6140040790	Approved	PLAROSE	PLAROSE	>
0000000058	STATE	PROGRAM_CODE	Add	42652	Approved	TSMITH8	TSMITH8	>
0000000061	STATE	PROGRAM_CODE	Add	51434	Approved	SGOMEZ	SGOMEZ	>

The **ChartField Request** page opens, click on **View Approval Flow**:

Request ID 000000007
Request Status Approved
Field Action Add
Telephone
*Business Unit 02100
SetID STATE
Field Name ACCOUNT
CF40XA
Email ID eric.hoefel@vermont.gov
Copy

Core Information
☐ Control Account
☐ Statistical Account
*Effective Date 07/01/2018
*Status Active
Monetary Account Type R
Unit of Measure
*Description Test Account
*Short Description TestAcct
Long Description

Business Justification
Attachments (1)

Request Comments
Questions
Trees

Request Action Go **View Approval Flow**

Requester ETEST Eric John Hoefel
Entered By ETEST Eric John Hoefel Entered Date/Time 10/30/2018 3:41 PM
Updated By JBECKER Becker, John M Updated Date/Time 10/31/2018 10:34 AM

Save Return to Search Previous in List Next in List Notify Add Update/Display

The **Approval Flow** page opens, click the rotating triangle to see who approved the request:

Approval Flow Help

Field Request Approval Stage

▶ Request ID 000000007:Approved View/Hide Comments

Return

You may also click the **View/Hide Comments** link to read any comments:

Approval Flow Help

Field Request Approval Stage

▼ Request ID 000000007:Approved View/Hide Comments

Path for Fields Approval

Approved
Becker, John M
Chartfield FINOPS Approvers
10/31/18 - 10:34 AM

▼ Comments

John M Becker at 10/31/18 - 10:34 AM
Pushback Test

John M Becker at 10/31/18 - 10:33 AM
Pushback test

Eric John Hoefel at 10/30/18 - 3:47 PM
Approver(s): Please make sure the Field Value is not blank and all the info is correct!

Return