



VISION 101

This guide walks you through VISION 9.2 introducing logging in and out,
WorkCenters, navigation steps, icons, and links.

All users should complete this guide first.

State of Vermont
Department of Finance & Management
VISION 9.2

November 2023

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Revisions to Manual

November 2023

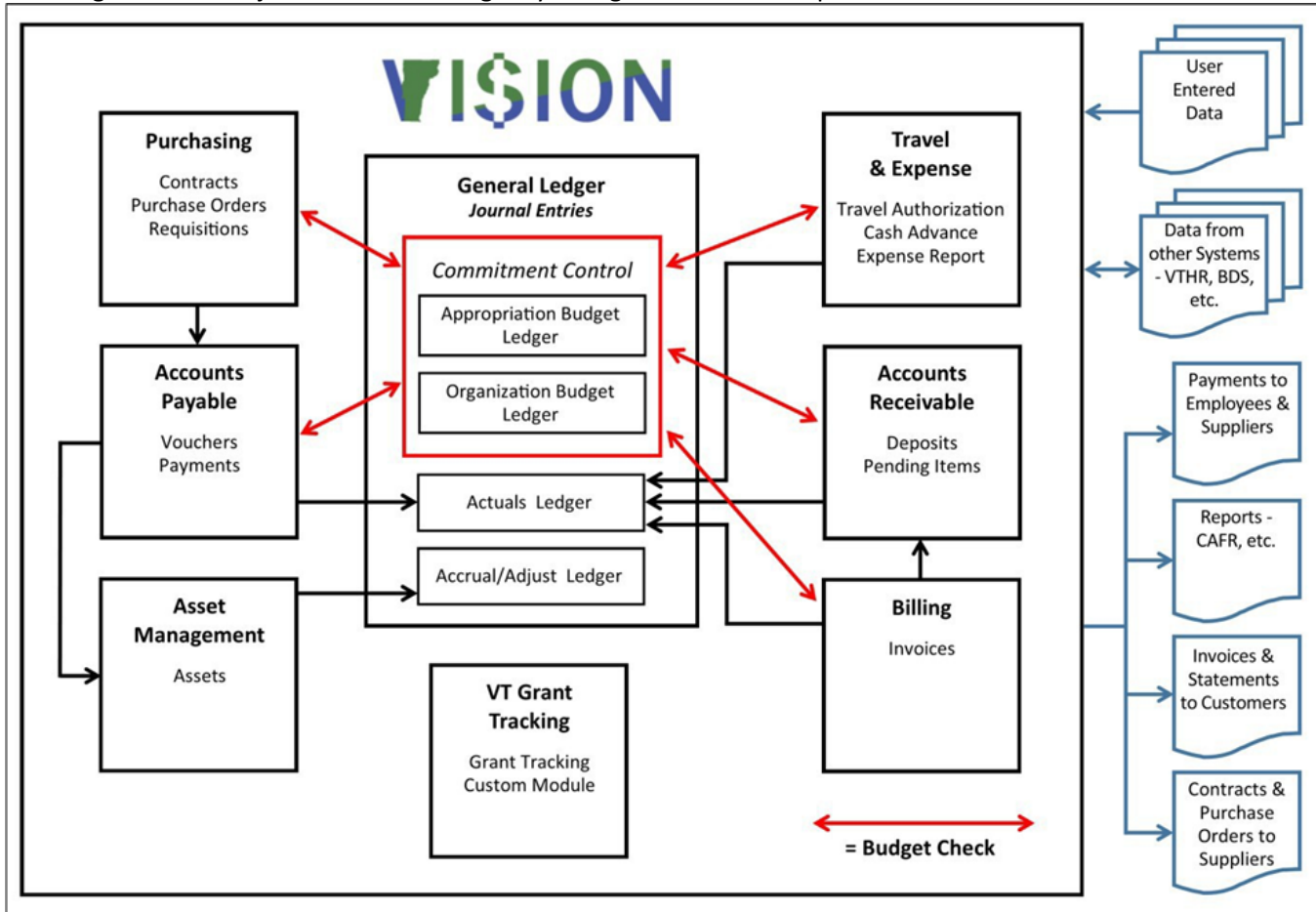
- Updated for PeopleTools 8.59 changes

December 2018

- Manual written

System Overview

VISION-Financials is an Oracle/PeopleSoft enterprise financial management system utilizing the following modules: General Ledger, Accounts Payable, Purchasing, Accounts Receivable, Billing, Asset Management, Travel & Expense, and VT Grant Tracking (*VT custom module*). The system is managed by the Dept of Finance & Management in conjunction with the Agency of Digital Services' PeopleSoft Technical Unit.



System Availability -VISION Financials Production is available 24 hours a day, seven days a week.

A “**Sandbox**” environment is available. “**Sandbox**” will be refreshed daily. The purpose of “sandbox” is to be able to do production-like things without impacting Production. You may use this environment to train, test the impact of adjustments, etc. **Do Not Use** “sandbox” for reporting.

VISION Support

Available from 7:45am to 4:30pm

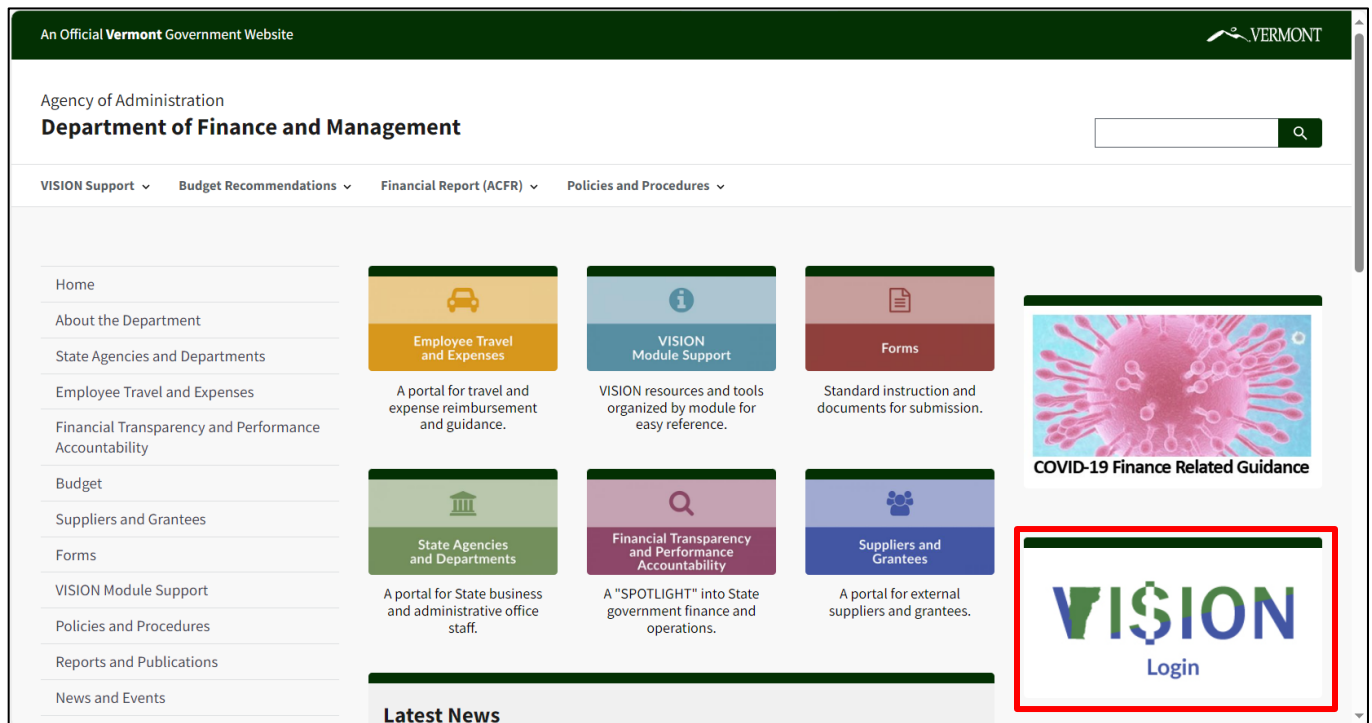
Call: (802) 828-6700, Option 2 or email VISION.FinHelpdesk@vermont.gov

Logging into VISION

VISION Financial Production login link can be found on the [Department of Finance & Management webpage](#).

- New users will need to work with their Department Business Manager to obtain a User ID and temporary password.
- Login information should never be shared with anyone.
- Users will be required set up the I Forgot My Password help the first time they log in to VISION 9.2. See the [Set up Forgotten Password Help](#) and [Email](#) section of this manual for instructions.
- The system will lock an account after three unsuccessful login attempts, a temporary password will be mailed to you but the I Forgot My Password help will not work until you contact VISION support at <mailto:VISION.Finhelpdesk@vermont.gov> to have your account unlocked.

Click on the VISION Login link:



The VISION Financials Production login page is displayed:

VERMONT Department of Finance & Management State of Vermont VISION

[Back to Finance Home](#)

User ID

Password

Sign In

[I Forgot My Password](#)

Need Time Entry or Employee Self Service?

[Go to VTHR Login](#)

VISION.FINHelpdesk@vermont.gov
802-828-6700 Option 2

1. User ID - Enter your VISION User ID or Employee ID number

2. Password - Enter Password:

New Password Requirements

- Passwords are case sensitive
- You can't use the same password more than once
- Must be at least 8 characters long
- Must contain at least one digit, one upper-case and one lower-case letter, and one special character - e.g.: !
- Expires every 90 days
- The login screen will display a notification each day for 10 days prior to the password expiring

3. Click on the **Sign In** button

First Time Sign In

When you first sign into VISION 9.2 you will use the temporary password sent to you by the VISION Helpdesk:

Back to Finance Home

VERMONT Department of Finance & Management
State of Vermont VISION

EHOEFEL

.....

Sign In

[I Forgot My Password](#)

Need Time Entry or Employee Self Service?

[Go to VTHR Login](#)

VISION.FINHelpdesk@vermont.gov
802-828-6700 Option 2

You will be prompted to change your password:

VERMONT Department of Finance & Management
State of Vermont VISION

Your password has expired.

[Click here to change your password.](#)

Click on [Click here to change your password:](#)

Change Password

User ID BSNOW
Betty Snow

*Current Password

*New Password

*Confirm Password

[Change or set up forgotten password help](#)

Change Password

1. **Current Password** - Enter the temporary password
2. **New Password** - Enter new password (see [new password requirements](#))
3. **Confirm Password** - Enter your new password again to confirm

4. Click **Change Password**

The screenshot shows a 'Change Password' form with the following fields: 'User ID' (BSNOW), 'Name' (Betty Snow), '*Current Password' (masked with three dots), '*New Password' (masked with three dots), and '*Confirm Password' (masked with three dots). There is a 'Change Password' button and a link 'Change or set up forgotten password help'. A 'Notify' button is at the bottom left. A message box is overlaid on the right, containing the text: 'Message', 'Forgotten Password help is not complete, please click 'OK' to go back and set this up.', and an 'OK' button.

You will receive a message requiring you to set up Forgotten Password help, click **OK**:

This screenshot is a zoomed-in view of the 'Change Password' form. The 'Change Password' button is highlighted with a dashed orange border. The other fields and links are the same as in the previous screenshot.

NOTE: The Current Password, New Password and Confirm Password fields have changed to show 3 dots, the information you entered to reset your password is still correct.

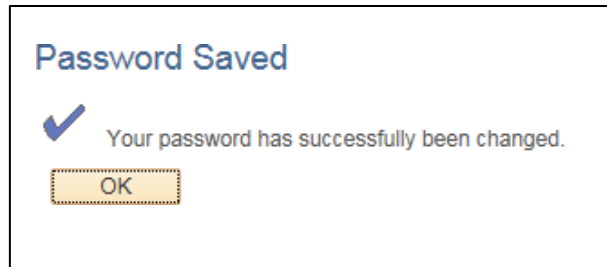
5. Click on the **Change or set up forgotten password help** link:

The screenshot shows a dialog box titled 'Change or set up forgotten password help'. It contains the text: 'If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you.' There is a 'Question' dropdown menu with 'What is the name of a memorable place?' selected. Below it is a 'Response' text field with 'New York City' entered. There are 'OK' and 'Cancel' buttons at the bottom. A 'Help' link is in the top right corner.

6. Select a security question and add your response

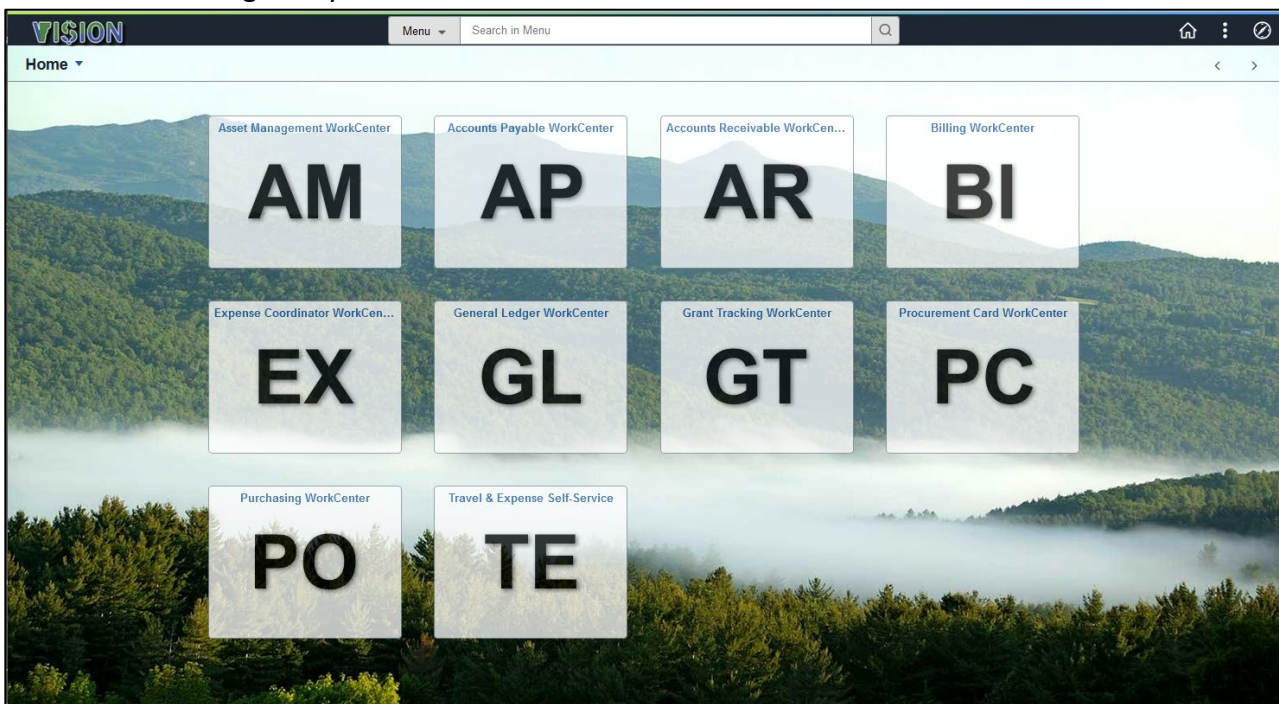
7. Click **OK**

You will receive the following confirmation message:



8. Click **OK**

You will be brought to your Home Screen:



Change Forgotten Password Help

Navigation: **NavBar** icon > **Menu** > **My System Profile**

Click on the **Change or set up forgotten password help** link:

The screenshot shows the 'General Profile Information' page. The 'Change or set up forgotten password help' link is highlighted with a red box. The page includes sections for Password, Personalizations, Alternate User, Workflow Attributes, and Miscellaneous User Links.

Click the **Question** drop box to see a list of available options. There are 13 questions to choose from. Choose the question that works best for you:

The screenshot shows the 'Change or set up forgotten password help' dialog box. The 'Question' drop box is open, showing a list of 13 questions. The first question, 'What is the name of a memorable place?', is selected. The questions are:

- What is the name of a memorable place?
- As a child, what did you want to do as an adult?
- What is the name of a memorable place?
- What is your LEAST favorite food?
- What is your biggest pet peeve?
- What is your father's middle name?
- What is your favorite book?
- What street did you live on when you were 12?
- What was the last name of your 4th grade teacher?
- What was the name of your favorite band in H.S.?
- What was your childhood phone number?
- Where do you want to retire?
- Who is your favorite Disney character?
- Who is your favorite actor/actress?

Enter your response to the security question:

Change or set up forgotten password help

Help

If you forget your password, you can have a new password emailed to you.
Enter a question and your response below. These will be used to authenticate you.

Question: What is the name of a memorable place?
Select from the list of questions.

Response:

OK Cancel

Click **OK**:

Change or set up forgotten password help

Help

If you forget your password, you can have a new password emailed to you.
Enter a question and your response below. These will be used to authenticate you.

Question: What is the name of a memorable place?
Select from the list of questions.

Response: New York City

OK Cancel

The forgotten password link should be used after the 2nd login attempt. After the 3rd attempt, your account will lock and the password that is emailed to you will not work. To unlock your account, you will need to contact VISION Support by email: vision.finhelppdesk@vermont.gov or call 802-828-6700 Option 2.

After completing these steps, you will be able to click on the **I Forgot My Password** link on the login page to have new password emailed to your business email address:

User ID

Password

Sign In

I Forgot My Password

☐ Enable Accessibility Mode

Need Time Entry or Employee Self Service?
[Go to VTHR Login](#)

Enter your User ID and Click **Continue**:

Forgotten Password

If you have forgotten your password, or your password has expired,
Enter your User ID below. This will be used to find your profile, in order to authenticate you.

User ID:

Continue

Enter your security question response and click [Email New Password](#):

Security Question

User ID ETEST

Please answer the following question below for user validation.

Question What is the name of a memorable place?

Response

Email New Password

You'll receive the following message:

Email Confirmation

Your new password has been emailed.

If you do not receive an email in your Primary Email Account please contact your Security Administrator or System Administrator to investigate the cause.

The temporary password is case sensitive and must be entered in the password field exactly as it was emailed to you, we suggest that you copy and paste.

Adding an Email Address

Navigation: **NavBar** icon > **Menu** icon > **My System Profile**

You cannot change your “Business” Email, this is the email address the system uses to send a new password when using the “I forgot my password” link. You can enter a different primary email account where all other system-generated email messages will be sent.

To add an email address to VISION, Click the **Plus** button.

General Profile Information

Eric John Hoefel

Password

Change password
Change or set up forgotten password help

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English

Currency Code: [Search]
Default Mobile Page: [Search]

Alternate User

If you will be temporarily unavailable, you can select an Alternate User to receive your Expense Module transactions only.

Alternate User ID: [Search]
From Date: [Date Picker] (example: 12/31/2000)
To Date: [Date Picker] (example: 12/31/2000)

Workflow Attributes

☒ Email User ☒ Worklist User

Miscellaneous User Links

Email		
Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	vision.expstestwf@vermont.gov

IM Information

Protocol	XMPP Domain	User ID	Password
XMPP	[Search]	[Search]	[Search]

Save

You will receive the following warning message, click **OK**:

Message

Please be advised that password reset emails will only be sent to the Business email address listed. (23700,1)



Please be advised that password reset emails will only be sent to the Business email address listed.

OK




Select the **Primary Email Account** option, you can only have one primary email account. Choose type from the **Email Type** drop down list. Enter your email address into the **Email Address** field and click the **Save** button.

Miscellaneous User Links



Email

Personalize | Find |  



First 1-2 of 2 Last


Primary Email Account	Email Type	Email Address		
<input type="checkbox"/>	Business	vision.exptestwf@vermont.gov		
<input checked="" type="checkbox"/>	Home	ejhoefel@verizon.com		

IM Information

Personalize | Find |  

First 1 of 1 Last

Protocol	XMPP Domain	UserID	Password		
XMPP	<input type="text"/>	<input type="text"/>	<input type="text"/>		

 Save

Resetting an expired password

If your password has expired, you will be prompted to change your password:



Click the link "[Click here to change your password](#)". If the window doesn't direct you to the change password page, close the window and try logging in again.

Change Password

User ID TCLOUD
Tim Cloud

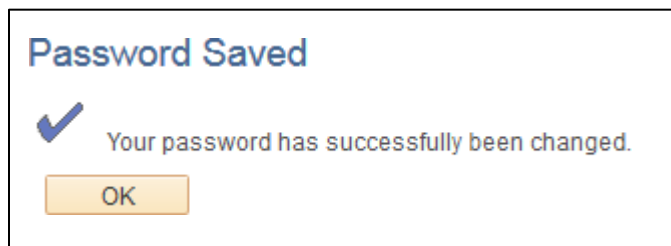
*Current Password

*New Password

*Confirm Password

[Change or set up forgotten password help](#)

1. **Enter Current Password** - Enter the password you used on the login screen.
2. **Enter New Password** (see [new password requirements](#))
3. **Enter Confirm Password.** Reenter the new password.
4. **Click on the Change Password button**

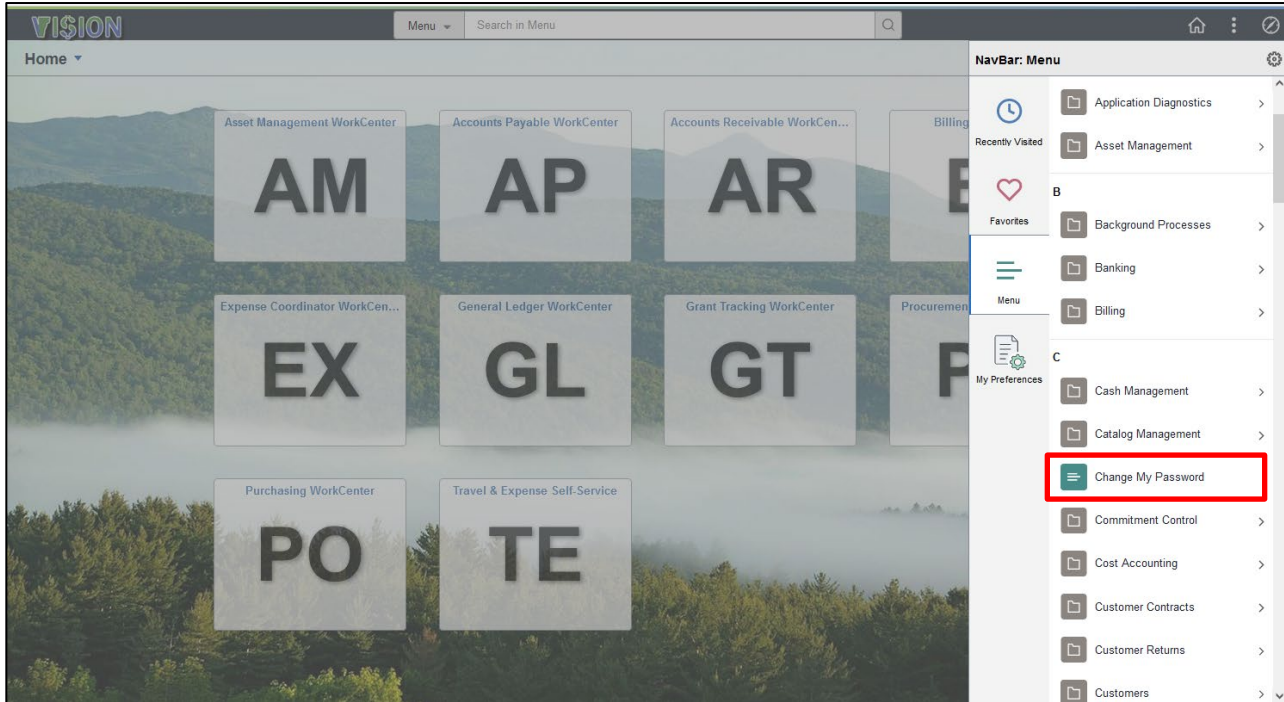


What to do if you are having difficulty logging in:

1. Verify you are on the VISON login page located on the Department of Finance and Management webpage – it has a white background.
2. Check your User ID. You can use either your Employee ID number or your VISION ID. Your VISION ID is the first letter of your first name followed by up to the first 7 characters of your last name in UPPERCASE. Some users' VISION ID may also have a number at the end.
3. Clear Cache. See the Clearing Your Browser Cache section of this manual for detailed instructions.
4. Contact VISION Support by email: vision.finhelpdesk@vermont.gov or call 802-828-6700 Option 2

Change Password

Passwords can be changed by going to [My System Profile](#) or by clicking the [Change My Password](#) link in the **Menu**:



The [Change Password](#) page will be displayed:

Change Password

User ID JSMITH
 John Smith

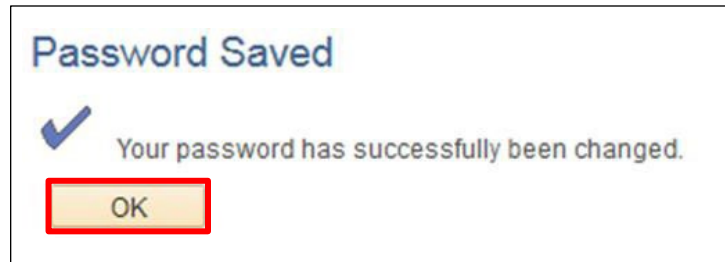
*Current Password

*New Password

*Confirm Password

[Change or set up forgotten password help](#)

1. **Enter Current Password** – Enter the password you used on the login screen.
2. **Enter New Password** (see [new password requirements](#))
3. **Enter Confirm Password**. Reenter the new password
4. Click on the **Change Password** Button

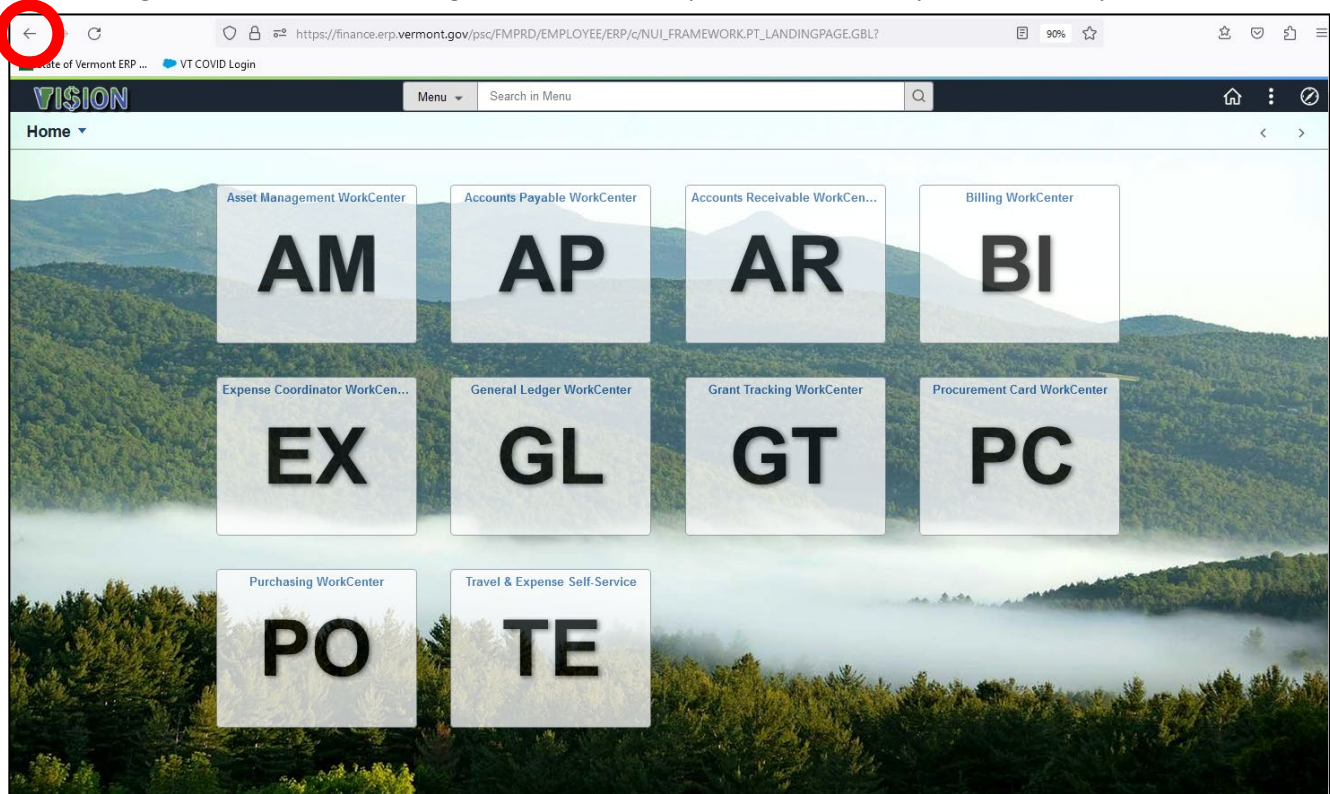


5. Click **OK**

System Navigation

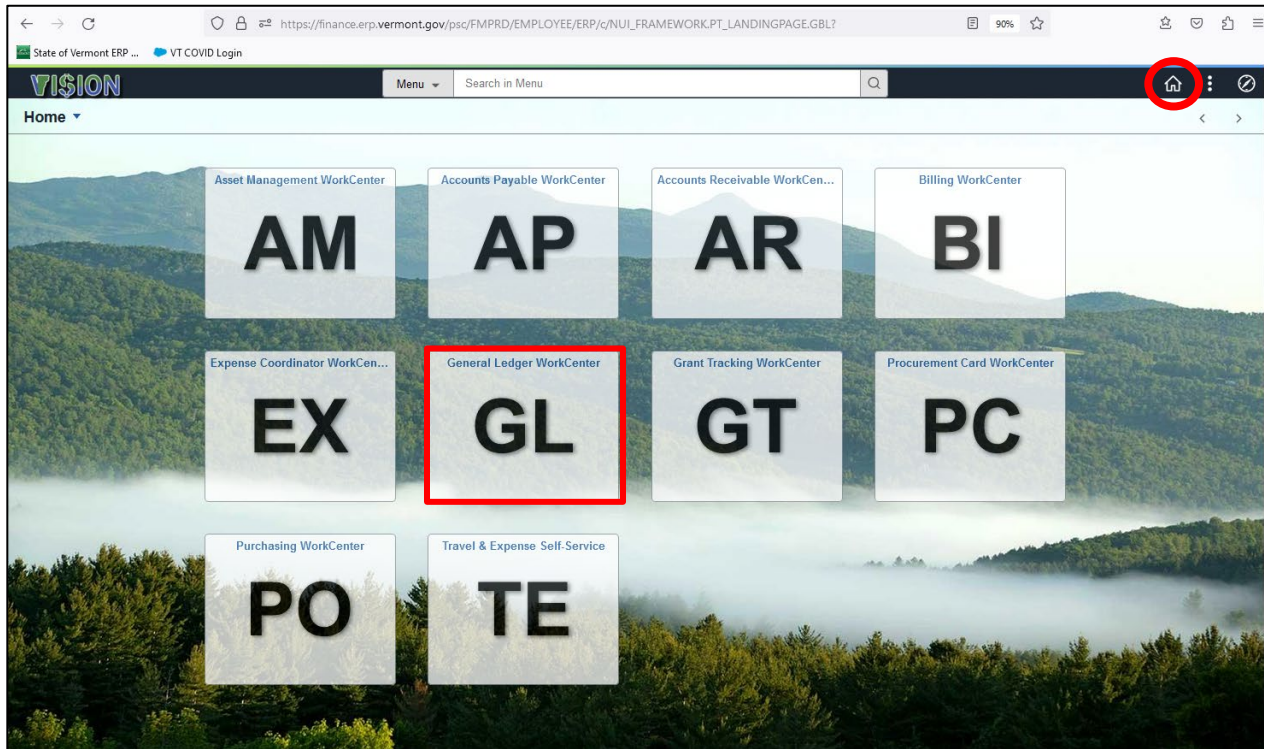
VISION Version 9.2 is a web-based application that uses many standard web browser features such as menus, drop down selection lists, icons, links, etc. The menu options you see will differ based on the security access appropriate for your job functions.

All Navigation should occur using the application menus and links and not by using the web browser back button. Using the web browser to navigate can cause the system to error and you will lose any unsaved data.

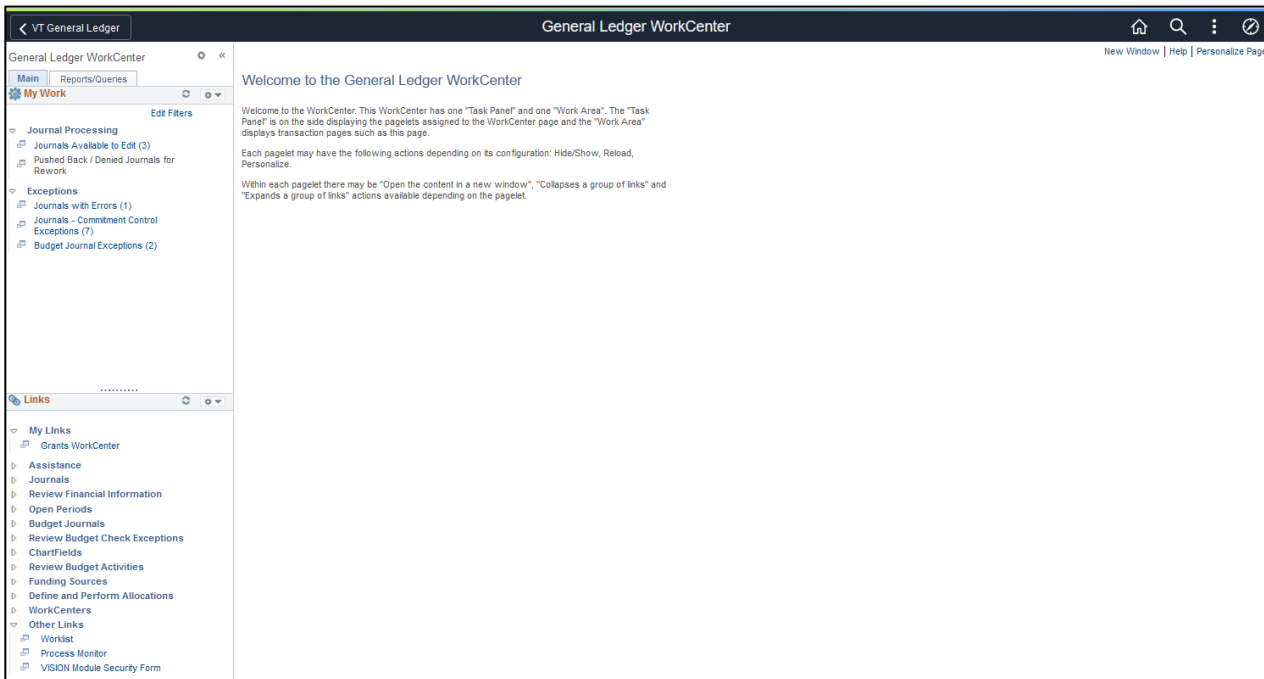


Using Tiles

When you first sign into VISION you will see your Home Screen. The Tiles you see will depend upon your VISION access. You can always return to the Home Screen by clicking the **Home** icon:

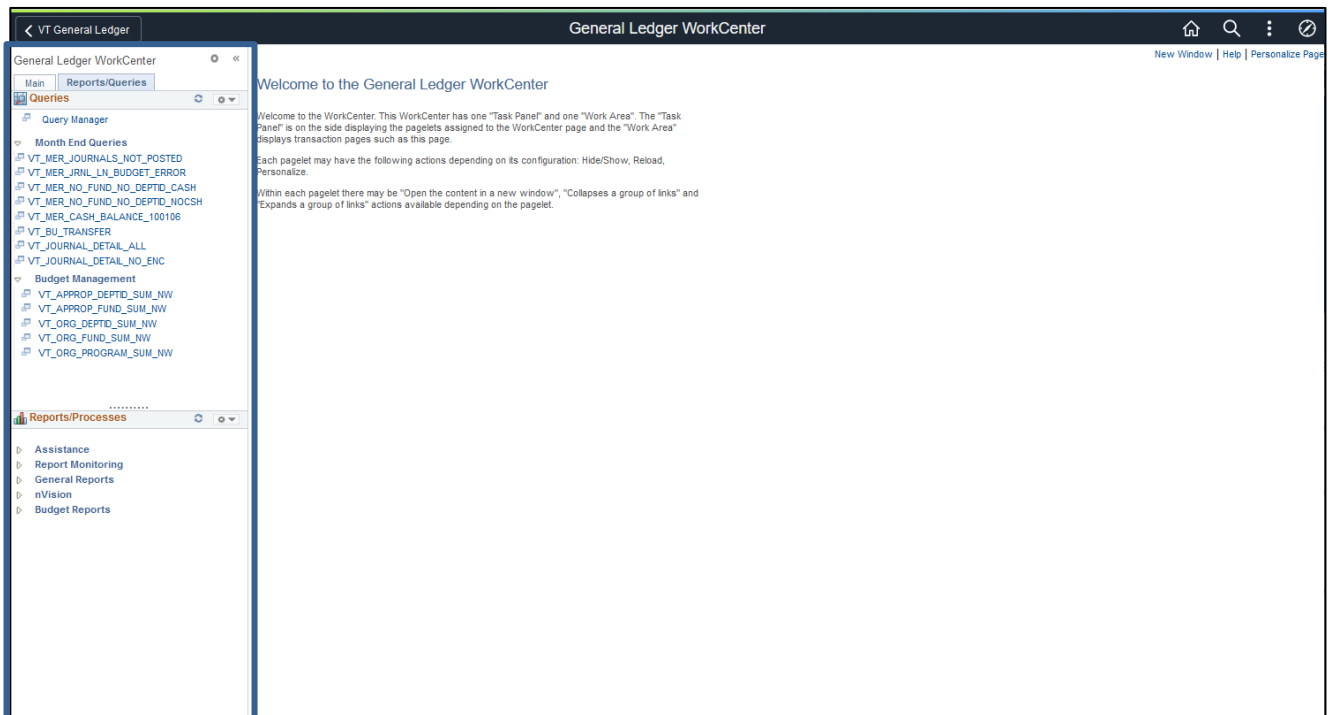
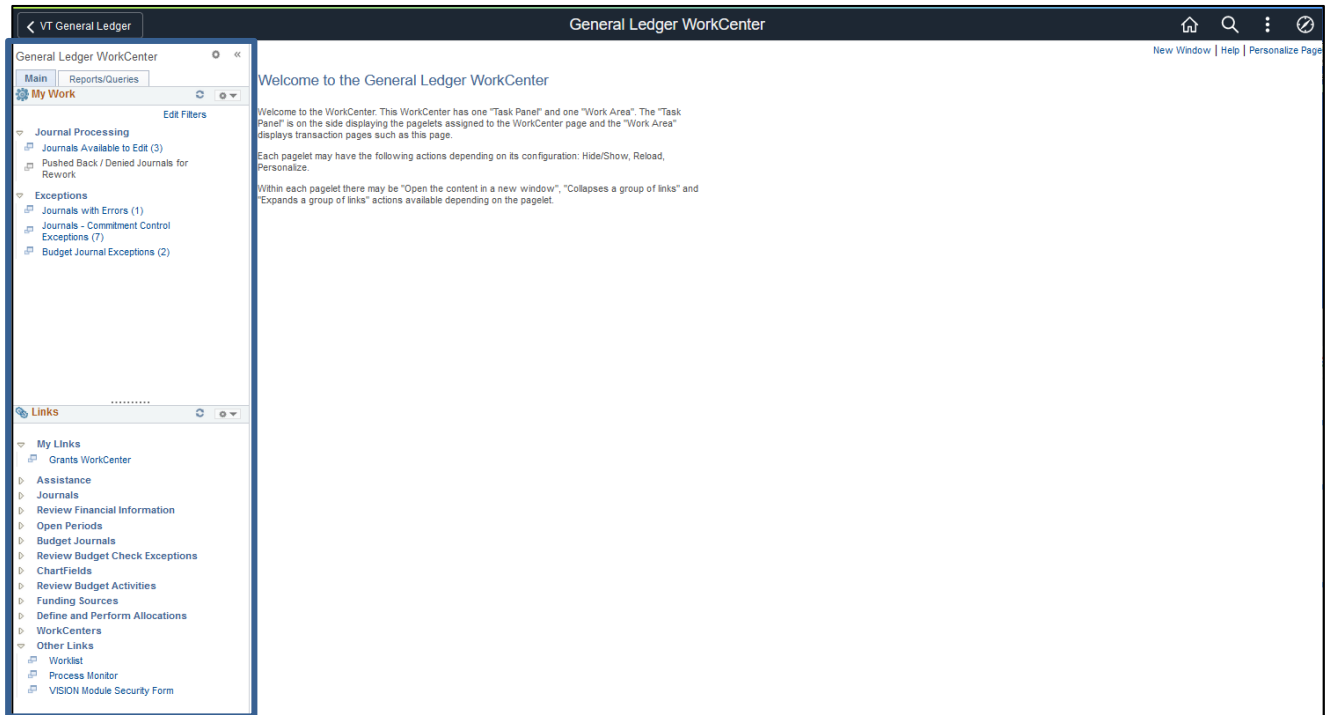


Clicking on a tile will take you to the associated module WorkCenter or page:



WorkCenters

Each WorkCenter includes four pagelets: My Work, Links, Queries, and Reports:



Links in the My Work pagelet will be blue and have an item count when there are items that require your attention. Clicking on an active link will open a list of work:

The screenshot shows the 'General Ledger WorkCenter' interface. On the left, the 'My Work' sidebar contains a list of links. The link 'Journals - Commitment Control Exceptions (7)' is highlighted with a red box and a red arrow pointing to the main content area. The main content area displays a table titled 'Journals - Commitment Control Exceptions' with columns: Unit, Journal ID, Journal Date, UnPost Sequence, Line Unit, InterUnit, Description, Status, Budget Status, Source, and Lines. The table contains 7 rows of data, all with a status of 'Valid' and a budget status of 'Error in Budget Check'. At the bottom of the table, there is a 'Select All / Deselect All' button and an 'Actions' dropdown menu.

Unit	Journal ID	Journal Date	UnPost Sequence	Line Unit	InterUnit	Description	Status	Budget Status	Source	Lines
01200	HR03272077	11/02/2023		01200		Payroll Costs	Valid	Error in Budget Check	HR	54
02150	HR03272095	11/02/2023		02150		Payroll Costs	Valid	Error in Budget Check	HR	638
02240	HR03272100	11/02/2023		02240		Payroll Costs	Valid	Error in Budget Check	HR	408
03400	HR03272111	11/02/2023		03400		Payroll Costs	Valid	Error in Budget Check	HR	524
06130	0003265553	11/01/2023		06130		ONL to correct Dept ID coding	Valid	Error in Budget Check	ONL	10
06130	HR03272122	11/02/2023		06130		Payroll Costs	Valid	Error in Budget Check	HR	1132
07110	HR03272126	11/02/2023		07110		Payroll Costs	Valid	Error in Budget Check	HR	287

Clicking the **Double Arrow** icon minimizes the pagelet window, click again to expand:

The screenshot shows the 'General Ledger WorkCenter' interface. The 'Journals - Commitment Control Exceptions' pagelet is now minimized, indicated by a red box around the 'Double Arrow' icon in the top right corner of the pagelet header. The main content area is now empty, and the sidebar remains visible.

General Ledger WorkCenter

Journals - Commitment Control Exceptions

Refine Filter Criteria

Personalize | Find | View All | First | 1-7 of 7 | Last

Unit	Journal ID	Journal Date	UnPost Sequence	Line Unit	InterUnit	Description	Status	Budget Status	Source	Lines
<input type="checkbox"/> 01200	HR03272077	11/02/2023		01200	<input type="checkbox"/>	Payroll Costs	Valid	Error in Budget Check	HR	54
<input type="checkbox"/> 02150	HR03272095	11/02/2023		02150	<input type="checkbox"/>	Payroll Costs	Valid	Error in Budget Check	HR	638
<input type="checkbox"/> 02240	HR03272100	11/02/2023		02240	<input type="checkbox"/>	Payroll Costs	Valid	Error in Budget Check	HR	408
<input type="checkbox"/> 03400	HR03272111	11/02/2023		03400	<input type="checkbox"/>	Payroll Costs	Valid	Error in Budget Check	HR	524
<input type="checkbox"/> 06130	0003265553	11/01/2023		06130	<input type="checkbox"/>	ONL to correct Dept ID coding	Valid	Error in Budget Check	ONL	10
<input type="checkbox"/> 06130	HR03272122	11/02/2023		06130	<input type="checkbox"/>	Payroll Costs	Valid	Error in Budget Check	HR	1132
<input type="checkbox"/> 07110	HR03272126	11/02/2023		07110	<input type="checkbox"/>	Payroll Costs	Valid	Error in Budget Check	HR	287

Select All / Deselect All

Actions

Clicking on a [Link](#) opens the functionality in the work area:

General Ledger WorkCenter

Enter Budget Journals

Find an Existing Value | Add a New Value

*Business Unit: 01110

*Journal ID: NEXT

*Journal Date: 11/02/2023

Add

Find an Existing Value | Add a New Value

My Links

- Grants WorkCenter
- Assistance
- Journals
- Review Financial Information
- Open Periods
- Enter Budget Journals**
- Manage Budget Journal Approval
- Review Budget Check Exceptions
- ChartFields
- Review Budget Activities
- Funding Sources
- Define and Perform Allocations
- WorkCenters
- Other Links
- Worklist
- Process Monitor

Clicking a **Query** link opens the query to run to HTML:

General Ledger WorkCenter

Month End Queries

VT_MER_JOURNALS_NOT_POSTED

View Results

Row	GL Business Unit	Ledger Group	Journal ID	Seq	Journal Date	Journal Class	Source	Journal Header Status	Budget Check Status	Journal Approval Status	Approval Step	Step Status	User	Long Descr	Total Debits	Total Credits	Year	Period
-----	------------------	--------------	------------	-----	--------------	---------------	--------	-----------------------	---------------------	-------------------------	---------------	-------------	------	------------	--------------	---------------	------	--------

After running the query, click the **Excel Spreadsheet** link to download to Excel:

General Ledger WorkCenter

Month End Queries

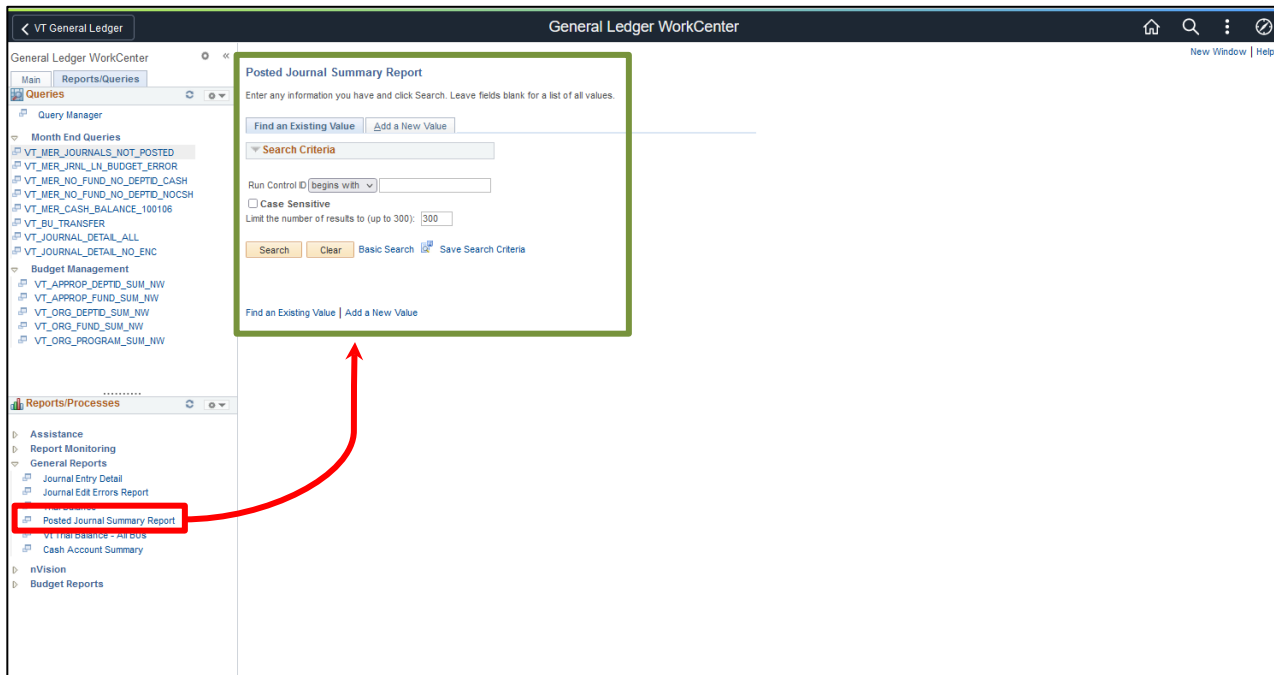
VT_MER_JOURNALS_NOT_POSTED

Download results in:

Excel Spreadsheet CSV Text File XML File (35 kb)

Row	GL Business Unit	Ledger Group	Journal ID	Seq	Journal Date	Journal Class	Source	Journal Header Status	Budget Check Status	Journal Approval Status	Approval Step	Step Status	User	Long Descr	Total Debits	Total Credits	Year	Period
1	08100	ACTUALS	0003271427	0	10/30/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	1588772.730	1588772.730	2024	4
2	08100	ACTUALS	0003271428	0	10/30/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	1208800.860	1208800.860	2024	4
3	08100	ACTUALS	0003271434	0	10/30/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	67032.460	67032.460	2024	4
4	08100	ACTUALS	0003272172	0	11/01/2023	CY	TSF	Valid Journal - Edits Complete	Valid	Pending Approval	1.00	A	JWOODS	REF #39678 10/16/23 LOCKBOX DEBIT MEMO TO CORRECT ENTRY, W. MUGFORD \$45.00 JE #3267910 J.WOODS	45.000	45.000	2024	5
5	08100	ACTUALS	0003272172	0	11/01/2023	CY	TSF	Valid Journal - Edits Complete	Valid	Pending Approval	2.00	P	JWOODS	REF #39678 10/16/23 LOCKBOX DEBIT MEMO TO CORRECT ENTRY, W. MUGFORD \$45.00 JE #3267910 J.WOODS	45.000	45.000	2024	5
6	08100	ACTUALS	0003272173	0	10/31/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	98.410	98.410	2024	4
7	08100	ACTUALS	0003272174	0	10/31/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	78.730	78.730	2024	4
8	08100	ACTUALS	0003272175	0	10/31/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	9.840	9.840	2024	4
9	08100	ACTUALS	0003272176	0	10/31/2023	CY	ONL	Valid Journal - Edits Complete	Valid	None			VP1	AOT INT JOURNAL	9.840	9.840	2024	4
10	08100	ACTUALS	0003272177	0	11/01/2023	CY	TSF	Valid Journal - Edits Complete	Valid	Pending Approval	1.00	A	JWOODS	REF #39679 10/17/23 S. BURLINGTON DEBIT MEMO TO CORRECT ENTRY, 21 USED CARS LLC FOR A. STARYKH \$148.00 JE #3267911 J.WOODS	148.000	148.000	2024	5

Clicking a Report link opens the report screen (see the reporting manual for additional instructions):



Managing your Worklist

Navigate to your Worklist by clicking the link in any WorkCenter or clicking **NavBar** icon > **Menu** icon > **Worklist**:

The screenshot displays the 'General Ledger WorkCenter' interface. The left sidebar contains navigation links under 'My Work' and 'Links'. The main area is titled 'Worklist' and shows a table of 'Worklist Items'. The table has columns: From, Date From, Work Item, Worked By Activity, Priority, and Link. A single item is listed for Karen Smith on 11/02/2023, with the work item 'Approval Routing' and activity 'Approval Workflow'. The priority is '3-Low'. The 'Link' column contains a long URL. Below the table, there is a 'Refresh' button. The 'Link' and 'Mark Worked' buttons for the highlighted item are circled in red.

From	Date From	Work Item	Worked By Activity	Priority	Link
Karen Smith	11/02/2023	Approval Routing	Approval Workflow	3-Low	Form Approval 71684 VT EXP ACC. 1900-01-01 to 0. Vision Expense Access Request Zachary Szepietowski 40530 SUCBMSR.CHANGE - 50885

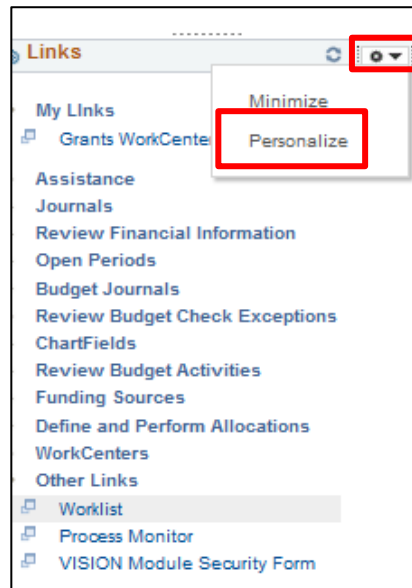
Click on the [link](#) to act on an approval request, any action removes the item from your Worklist. Or click on **Mark Worked** to remove notifications from your Worklist.

Personalizing WorkCenters

You can add links to functionality, queries, and reports (the My Work section cannot be personalized.)

Adding a link to web content to the Links pagelet

To add a link, click on the **Links Pagelet Settings** pull down menu and select **Personalize**:



The **Define User Links** window opens:

A screenshot of the 'Links Pagelet Personalization' window. The window shows the 'Link Groups' section with a search bar, a 'Find' button, and a 'View All' button. The 'Link List' section is also visible, showing a table with columns for 'Define Link', 'Display Order', 'Link Label', 'Link Type', 'Show Link', 'Starting Page', and 'Open in New Window'. A red box highlights the '+' icon in the top right corner of the 'Link Groups' section, indicating where to click to add a new link group.

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define	10	General Ledger Module Support	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. Click the + icon to add a new link group

Define User "Links" Links

Links Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID EHOEFEL

Link Groups ? Find | View All First 2 of 13 Last

*Group Label My Links

Display Order 13

☐ Start Group Collapsed

Link List ? Personalize | Find | First 1 of 1 Last

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define			Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

2. Enter a **Group Label** and the **Display Order** you want it in
3. Click **Define**

The **Define Link** window opens:

Define Link

*Link Type URL

Some URLs may not render properly. Check 'Open in New Window' in the previous page if that happens.

URLID mont.gov/training-and-support/vision-chartfields-and-accounting-periods

Label Chartfield and Accounting Periods

OK Cancel

4. Select a **Link Type** from the drop-down menu
5. Insert the **URLID** you want to add and a descriptive **Label**
6. Click **OK**

You are returned to the **Links Pagelet Personalization** window:

Links Pagelet Personalization
Configuration ID GL General Ledger WorkCenter
User ID EHOEFEL

Link Groups ? Find | View All First 2 of 13 Last

*Group Label My Links

Display Order 13

☒ Start Group Collapsed

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define		Chartfield and Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save

7. Select **Start Group Collapsed** to show only the group title in the Links pagelet
8. Select **Open in New Window** to open the link in a new browser (recommended for non-PeopleSoft pages)
9. Click **Save**

The following **Message** displays:

Message

Refresh the pagelet to see your changes. (7980,22)

OK

10. Click **OK**

Define User "Links" Links

Links Pagelet Personalization
Configuration ID GL General Ledger WorkCenter
User ID EHOEFEL

Delete Personalization

Link Groups ? Find | View All First 13 of 13 Last

*Group Label My Links

Display Order 13

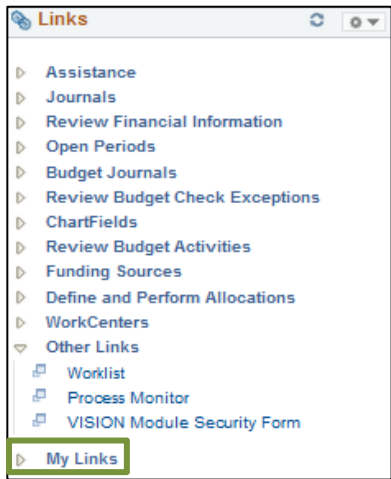
☒ Start Group Collapsed

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define		Chartfield and Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save

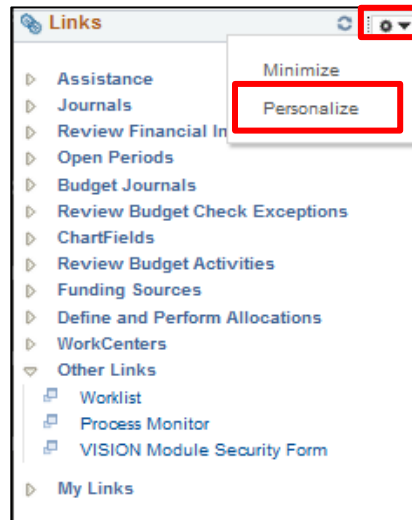
11. Click on the **X** to close the window

Click the **Refresh Pagelet** icon, you have added a link to web content. You have added a new Links Group to your Links Pagelet:



Adding a link to a PeopleSoft page to the Links pagelet

To add a link, click on the **Links Pagelet Settings** pull down menu and select **Personalize**:

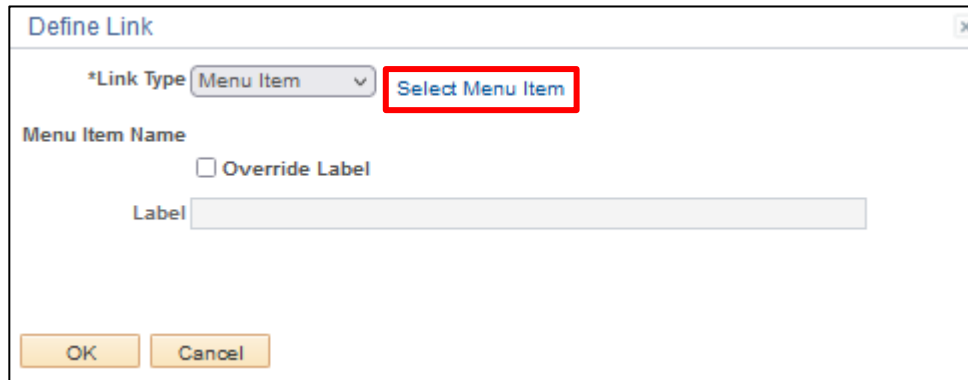


This opens the **Define User "Links" Links** window:

A screenshot of the 'Define User "Links" Links' window. The window title is 'Define User "Links" Links'. The main heading is 'Links Pagelet Personalization'. Below this, it shows 'Configuration ID GL' and 'General Ledger WorkCenter'. The 'User ID' is 'EHOEFEL'. There is a 'Delete Personalization' button. The 'Link Groups' section shows a search bar with 'My Links' and a 'Display Order' of '13'. There is a 'Start Group Collapsed' checkbox. The 'Link List' section is a table with columns: 'Define Link', 'Display Order', 'Link Label', 'Link Type', 'Show Link', 'Starting Page', 'Open in New Window', and 'Last'. The table has two rows: one for 'Chartfield and Accounting Periods' (URL) and one for 'Menu Item'. The 'Define' button is highlighted with a red rectangle. The 'Last' button is also highlighted with a red rectangle. There is a 'Save' button at the bottom.

1. Click **Last** to bring up the My Links Group (or create a new group, see the preceding exercise)
2. Click the **+** icon to add a new link
3. Click **Define**

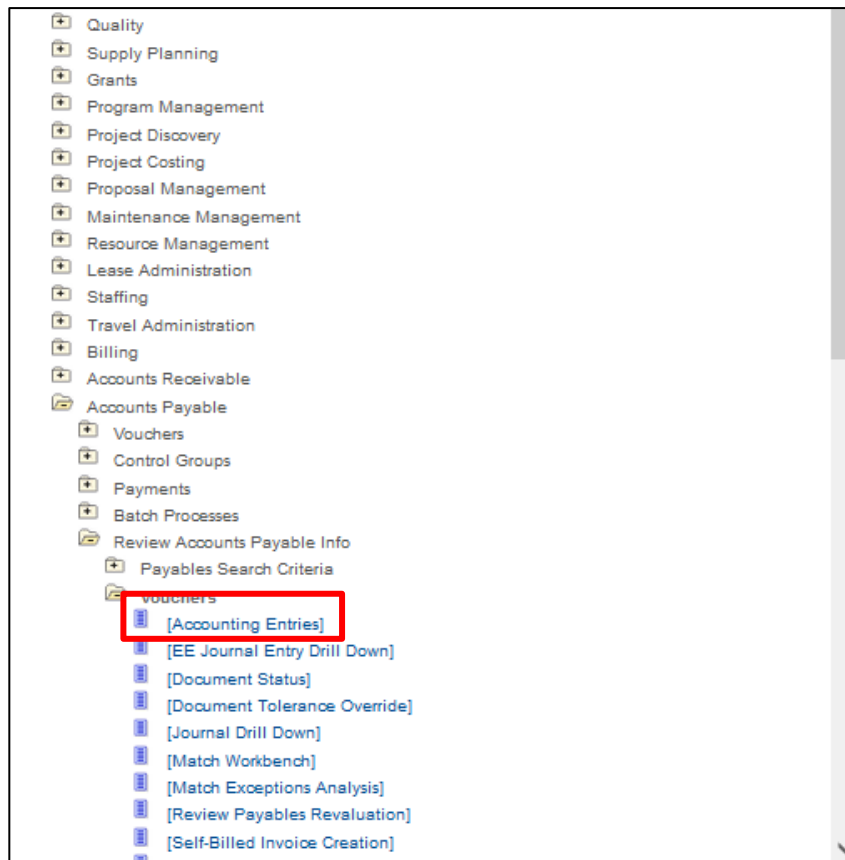
The **Define Link** window opens:



The **Define Link** window is a dialog box with a title bar. It contains a dropdown menu for ***Link Type** set to **Menu Item**. To the right of the dropdown is a blue link labeled **Select Menu Item**, which is highlighted with a red rectangle. Below the dropdown is a **Menu Item Name** label and an unchecked **Override Label** checkbox. A **Label** text input field is positioned below the checkbox. At the bottom are **OK** and **Cancel** buttons.

4. Click the **Select Menu Item** link

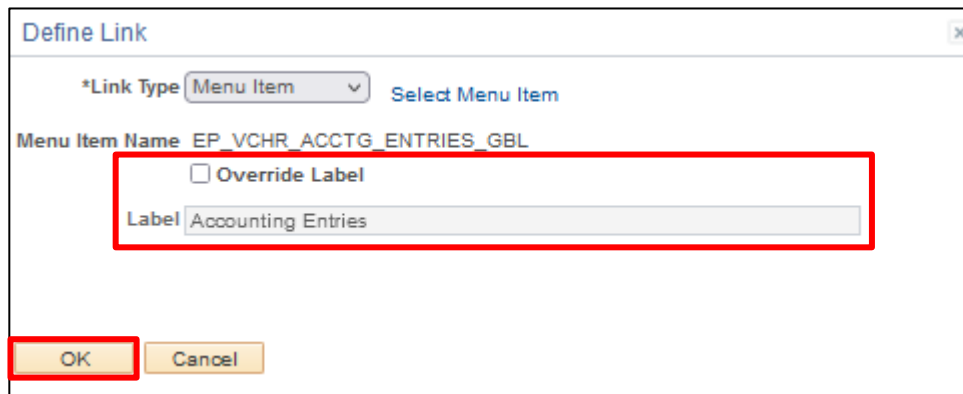
The **Select a Content Reference** window opens:



The **Select a Content Reference** window displays a hierarchical tree of system components. The tree includes categories like Quality, Supply Planning, Grants, Program Management, Project Discovery, Project Costing, Proposal Management, Maintenance Management, Resource Management, Lease Administration, Staffing, Travel Administration, Billing, Accounts Receivable, Accounts Payable, Vouchers, Control Groups, Payments, Batch Processes, Review Accounts Payable Info, Payables Search Criteria, and a sub-category for vouchers. The **[Accounting Entries]** item under the vouchers category is highlighted with a red rectangle.

5. Click on the **page** you want to link to

You are returned to the **Define Link** page:

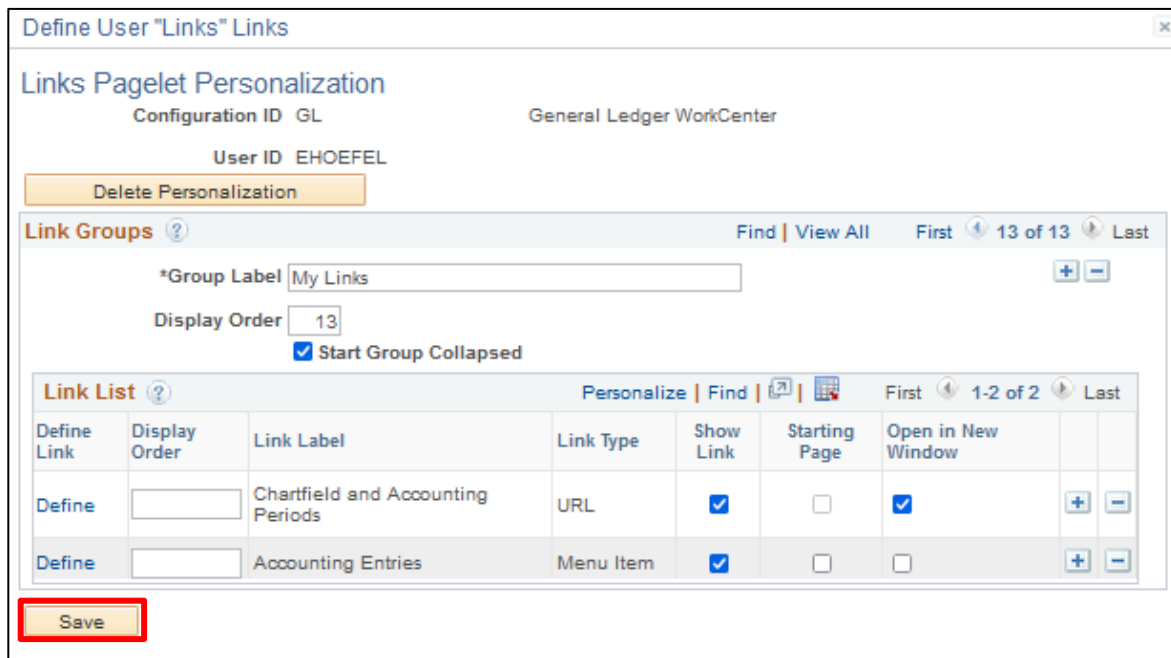


The 'Define Link' dialog box is shown. It has a title bar with 'Define Link' and a close button. Inside, there is a dropdown menu for '*Link Type' set to 'Menu Item' with a 'Select Menu Item' link next to it. Below this is the 'Menu Item Name' field with the value 'EP_VCHR_ACCTG_ENTRIES_GBL'. A red rectangle highlights the 'Override Label' checkbox (which is unchecked) and the 'Label' text field containing 'Accounting Entries'. At the bottom, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red rectangle.

6. Click on the **Override Label** box if you want to edit the default label

7. Click **OK**

You are returned to the **Define User "Links" Links** window:

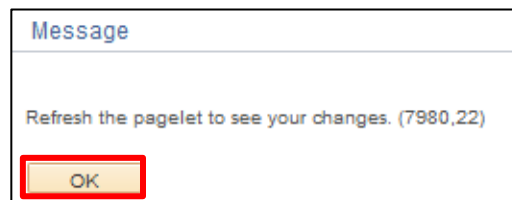


The 'Define User "Links" Links' window is shown. It has a title bar with 'Define User "Links" Links' and a close button. The main content area is titled 'Links Pagelet Personalization' and shows configuration details for 'Configuration ID GL' and 'General Ledger WorkCenter'. The 'User ID' is 'EHOEFEL'. There is a 'Delete Personalization' button. Below this is the 'Link Groups' section with a search bar, 'Find | View All' buttons, and pagination 'First 13 of 13 Last'. The '*Group Label' is 'My Links' and 'Display Order' is '13'. There is a checkbox for 'Start Group Collapsed' which is checked. Below the group settings is the 'Link List' table. The table has columns: 'Define Link', 'Display Order', 'Link Label', 'Link Type', 'Show Link', 'Starting Page', 'Open in New Window', and actions. There are two rows of links: 'Chartfield and Accounting Periods' (URL type) and 'Accounting Entries' (Menu Item type). The 'Save' button at the bottom is highlighted with a red rectangle.

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window	
Define		Chartfield and Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Define		Accounting Entries	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

8. Click **Save**

The following **Message** opens:



The 'Message' dialog box is shown. It has a title bar with 'Message'. The message text says 'Refresh the pagelet to see your changes. (7980,22)'. At the bottom, there is an 'OK' button highlighted with a red rectangle.

9. Click **OK**

You are returned to the **Define User “Links” Links** window:

Define User "Links" Links

Links Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID EHOEFEL

Delete Personalization

Link Groups ? Find | View All First 13 of 13 Last

*Group Label My Links

Display Order 13

☒ Start Group Collapsed

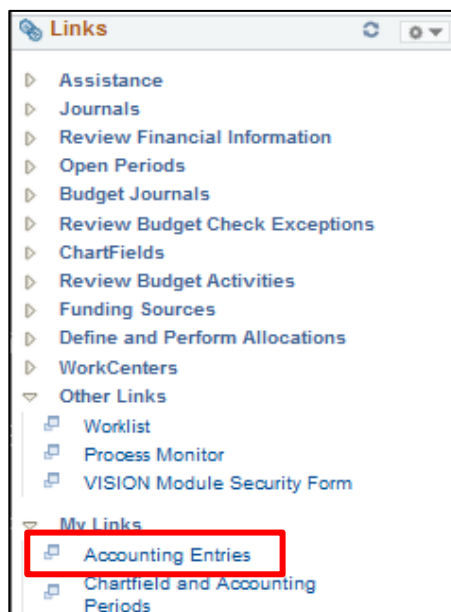
Link List ? Personalize | Find | First 1-2 of 2 Last

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define		Accounting Entries	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define		Chartfield and Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Save

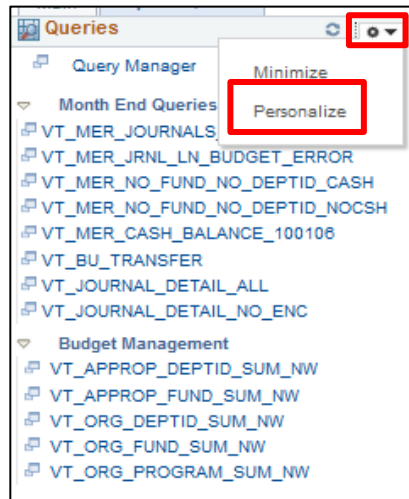
10. Click on the **X** to close the window

The new link appears in the **Links Pagelet**:



Adding a query to the Queries pagelet

To add a query, click on the **Queries Pagelet Settings** pull down menu and select **Personalize**:



This opens the **Define User Query Links** window:

A screenshot of the 'Define User Query Links' window. The window title is 'Define User Query Links'. Below the title bar, it says 'Queries Pagelet Personalization'. The configuration ID is 'GL' and the user ID is 'EHOEFEL'. There is a 'Find' button and a 'View All' button. A red box highlights the '+' icon next to the 'Find' button. Below this, there is a 'Query Groups' section with a 'Group Label' field set to 'Month End Queries' and a 'Display Order' field set to '1'. There is a checkbox for 'Start Group Collapsed'. Below this is a 'Query Definition' table with columns: Display Order, Owner, *Type, Query Name, Description, Show Link, and Starting Page. The table contains 8 rows of query definitions. At the bottom of the window is a 'Save' button.

Display Order	Owner	*Type	Query Name	Description	Show Link	Starting Page
10	Public Owner	Query	VT_MER_JOURNALS_NOT_POSTED	VT_MER_JOURNALS_NOT_POSTED	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20	Public Owner	Query	VT_MER_JRNL_LN_BUDGET_ERROR	VT_MER_JRNL_LN_BUDGET_ERROR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
30	Public Owner	Query	VT_MER_NO_FUND_NO_DEPTID_CASH	VT_MER_NO_FUND_NO_DEPTID_CASH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
40	Public Owner	Query	VT_MER_NO_FUND_NO_DEPTID_NOCASH	VT_MER_NO_FUND_NO_DEPTID_NOCASH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
50	Public Owner	Query	VT_MER_CASH_BALANCE_100106	VT_MER_CASH_BALANCE_100106	<input checked="" type="checkbox"/>	<input type="checkbox"/>
60	Public Owner	Query	VT_BU_TRANSFER	VT_BU_TRANSFER	<input checked="" type="checkbox"/>	<input type="checkbox"/>
70	Public Owner	Query	VT_JOURNAL_DETAIL_ALL	VT_JOURNAL_DETAIL_ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
80	Public Owner	Query	VT_JOURNAL_DETAIL_NO_ENC	VT_JOURNAL_DETAIL_NO_ENC	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1. Click on the + icon to open a new Query Group

A new **Query Group** opens:

Define User Query Links

Queries Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID EHOEFEL

Query Groups ? Find | View All First 2 of 3 Last

*Group Label My Queries

Display Order 3

☐ Start Group Collapsed

Query Definition ? Personalize | Find | 1 of 1 Last

Display Order	Owner	*Type	Override Title/Description	Query Name	Description	Show Link	Starting Page
	Public Owner	Query	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save

2. Enter a **Group Label**
3. Select the **Display Order**
4. Click on the **Look up** icon

The **Look Up Query Name** window opens:

Look Up Query Name

Search by: Query Name begins with VT_MER

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-37 of 37 Last

Query Name	Description
VT_MER_ASSETS_NO_ACCTG_ENTRIES	Assets with no Acctg Entries
VT_MER_ASSETS_NO_DEPTID	Assets w/no Dept ID
VT_MER_ASSETS_POSTED_NOT_JG	assets posted not JG
VT_MER_ASSET_NOT_ADDED	Vchr over \$4,999 - Asset?
VT_MER_ASSET_NO_FUND_NO_DEPTID	ISF Assets w/No Fund
VT_MER_ASSET_REVIEW	use to review new added assets
VT_MER_BI_COMPLETED_NOT_JG	Invoices posted not JG
VT_MER_BI_NOT_COMPLETED	Billing Invoices not posted
VT_MER_CASH_ADVANCE_LIST	List of paid cash advances
VT_MER_CASH_ADV_NOT_JG	Cash Adv posted not journaled
VT_MER_CASH_ADV_NOT_POSTED	Cash Advance not posted
VT_MER_CASH_ADV_POSTED_NOT_PD	Open Cash Advance
VT_MER_CASH_BALANCE_100106	returns 100106 bal for a BU
VT_MER_DEPOSITS_NOT_POSTED	Dep. not Dir Jrnls & not posted
VT_MER_DJ_NOT_POSTED_TO_GL	MnthEndRpt/DrcJrnls NotPosted
VT_MER_EXP_RPT_NOT_JG	Exp Rpt posted not journaled
VT_MER_EXP_RPT_NOT_POSTED	Expense Reports not posted
VT_MER_GROUPS_NOT_POSTED	Pending items not yet posted
VT_MER_GROUPS_POSTED_NOT_JG	Groups posted not jg
VT_MER_JOURNALS_NOT_POSTED	Month End Rpt/JE's not posted
VT_MER_JRNL_LN_BUDGET_ERROR	Journal line bud error
VT_MER_LEASE_LOG	Exp detail for Leases
VT_MER_NO_FUND_NO_DEPTID_CASH	acct bal with no fund/deptid
VT_MER_NO_FUND_NO_DEPTID_NOCASH	acct bal with no fund/deptid
VT_MER_OPEN_AP	Open AP as of Month End Date
VT_MER_OPEN_CASH_ADVANCE	Open Cash Advance Balances
VT_MER_PO_NOT_FINISHED	Mnth End Rpt/PO's not posted
VT_MER_PO_NOT_STATUS_C	PO's not at Complete status
VT_MER_REQ_NOT_FINISHED	Mnth End Rpt/ Reqs not posted
VT_MER_REQ_NOT_STATUS_C	Req's not at Complete status
VT_MER_TAUTN_NOT_APPROVED	TA's not approved
VT_MER_TA_OPEN_ENC	List of open Travel Auths/ENC
VT_MER_TA_OPEN_ENC_ALL_CF	List of open TA's w/Chartfield
VT_MER_VCHRS_NOT_POSTED	AP Vouchers not posted
VT_MER_VCHR_BUILD_NOT_COMPLETE	voucher build not complete

5. Enter search criteria
6. Click **Look Up**
7. Click on the query you want to add

You are returned to the **Define User Query Links** window:

Define User Query Links

Queries Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID EHOEFEL

Query Groups ? Find | View All First 2 of 3 Last

*Group Label My Queries

Display Order 3

☐ Start Group Collapsed

Query Definition ? Personalize | Find | 1 of 1 Last

Display Order	Owner	*Type	Override Title/Description	Query Name	Description	Show Link	Starting Page
	Public Owner	Query	<input type="checkbox"/>	VT_MER_VCHRS_NOT_POST	AP Vouchers not posted	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save

8. Click **Save**

The following **Message** opens:

Message

Refresh the pagelet to see your changes. (7980,22)

OK

You are returned to the **Define User Query Links** window:

Define User Query Links

Queries Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID EHOEFEL

Query Groups ? Find | View All First 2 of 3 Last

*Group Label My Queries

Display Order 3

☐ Start Group Collapsed

Query Definition ? Personalize | Find | 1 of 1 Last

Display Order	Owner	*Type	Override Title/Description	Query Name	Description	Show Link	Starting Page
	Public Owner	Query	<input type="checkbox"/>	VT_MER_VCHRS_NOT_POST	AP Vouchers not posted	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save

9. Click on the **X** to close the window

The new link appears in the **Queries Pagelet**:

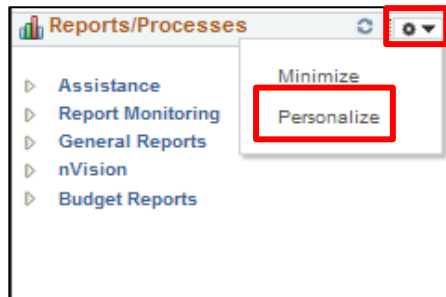
Queries

Query Manager

- Month End Queries
 - VT_MER_JOURNALS_NOT_POSTED
 - VT_MER_JRNL_LN_BUDGET_ERROR
 - VT_MER_NO_FUND_NO_DEPTID_CASH
 - VT_MER_NO_FUND_NO_DEPTID_NOCASH
 - VT_MER_CASH_BALANCE_100106
 - VT_BU_TRANSFER
 - VT_JOURNAL_DETAIL_ALL
 - VT_JOURNAL_DETAIL_NO_ENC
- Budget Management
 - VT_APPROP_DEPTID_SUM_NW
 - VT_APPROP_FUND_SUM_NW
 - VT_ORG_DEPTID_SUM_NW
 - VT_ORG_FUND_SUM_NW
 - VT_ORG_PROGRAM_SUM_NW
- My Queries
 - AP Vouchers not posted

Adding a report to the Reports/Processes pagelet

To add a report, click on the **Reports/Processes Pagelet Settings** pull down menu and select **Personalize**:



This opens the **Define User "Reports" Links** window:

A screenshot of the 'Define User "Reports" Links' window. The window title is 'Define User "Reports" Links'. Below the title bar, it says 'Reports/Processes Pagelet Personalization'. The configuration ID is 'GL' and the General Ledger WorkCenter is 'General Ledger WorkCenter'. The user ID is 'EHOEFEL'. There is a 'Link Groups' section with a search bar containing 'Assistance' and a 'Display Order' of '1'. A red box highlights a '+' icon next to the search bar. Below this is a 'Link List' section with a table. The table has columns: Define Link, Display Order, Link Label, Link Type, Run Control ID, Show Link, Starting Page, and Open in New Window. The first row shows 'Define', '1', 'Report/Query Assistance', 'URL', and 'Show Link' is checked. A red box highlights the 'Define' link in the first row of the table. At the bottom is a 'Save' button.

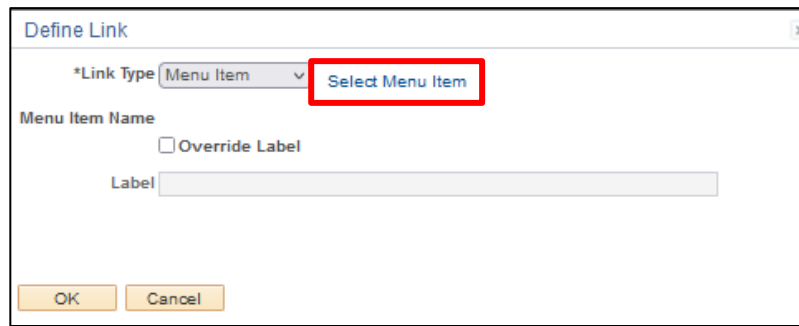
1. Click on the **+** icon to open a new Link Group

A new **Link Group** opens:

A screenshot of the 'Define User "Reports" Links' window, showing a new Link Group. The 'Link Groups' section now has a search bar containing 'My Reports' and a 'Display Order' of '8'. A red box highlights the search bar and the 'Display Order' field. Below this is the 'Link List' section. The table now has two rows. The first row is 'Define', '1', 'Menu Item', and 'Run Control ID' is empty. A red box highlights the 'Define' link in the first row of the table. At the bottom is a 'Save' button.

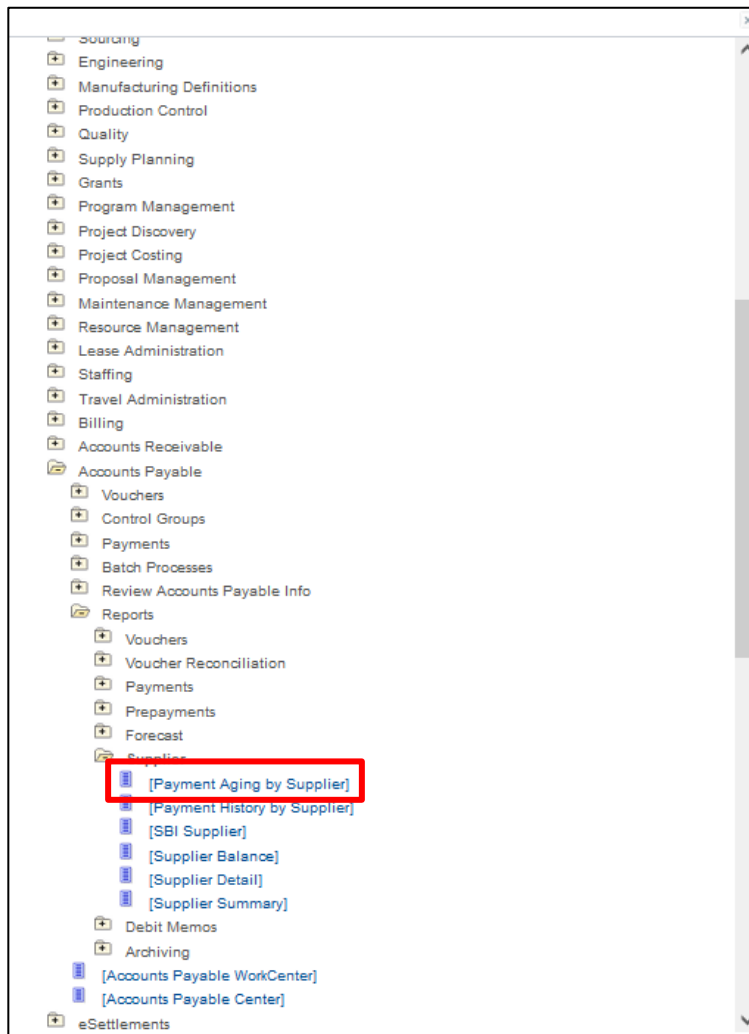
2. Enter a **Group Label**
3. Set the **Display Order**
4. Click on **Define**

The **Define Link** window opens:



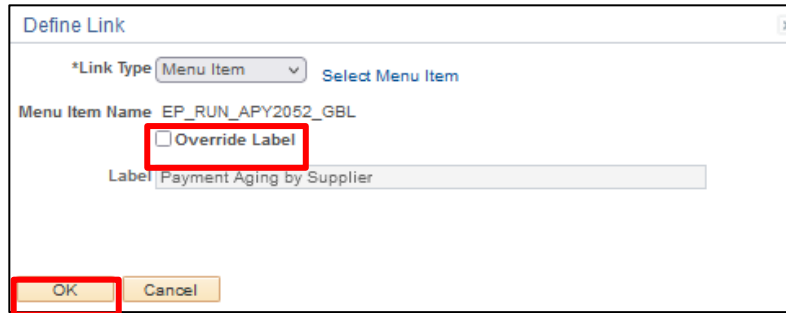
5. Click on **Select Menu Item**

The **Select a Content Reference** window opens:



6. Click on the page you want to link to

The **Define Link** window opens:



Define Link

*Link Type: Menu Item (dropdown) Select Menu Item

Menu Item Name: EP_RUN_APY2052_GBL

☐ Override Label

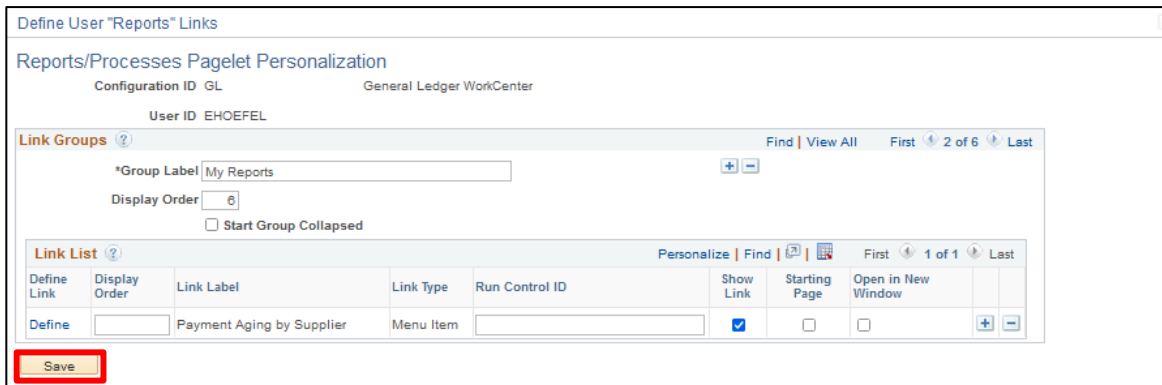
Label: Payment Aging by Supplier

OK Cancel

7. Click on the **Override Label** box if you want to edit the default label

8. Click **OK**

You are returned to the **Define User “Links” Links** window:



Define User "Reports" Links

Reports/Processes Pagelet Personalization

Configuration ID: GL General Ledger WorkCenter

User ID: EHOEFEL

Link Groups

*Group Label: My Reports

Display Order: 6

☐ Start Group Collapsed

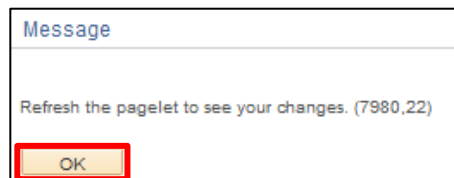
Link List

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window
Define		Payment Aging by Supplier	Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

9. Click **Save**

The following **Message** displays:



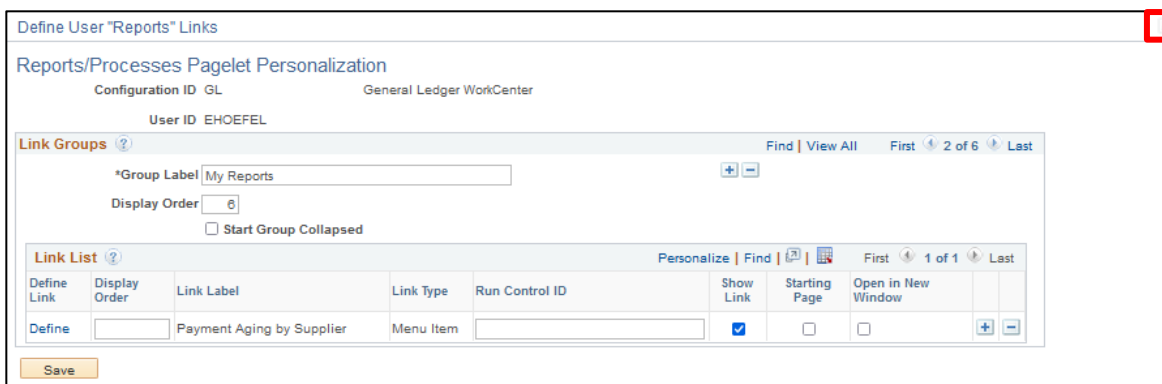
Message

Refresh the pagelet to see your changes. (7980,22)

OK

10. Click **OK**

You are returned to the **Define User “Links” Links** window:



Define User "Reports" Links

Reports/Processes Pagelet Personalization

Configuration ID: GL General Ledger WorkCenter

User ID: EHOEFEL

Link Groups

*Group Label: My Reports

Display Order: 6

☐ Start Group Collapsed

Link List

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window
Define		Payment Aging by Supplier	Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

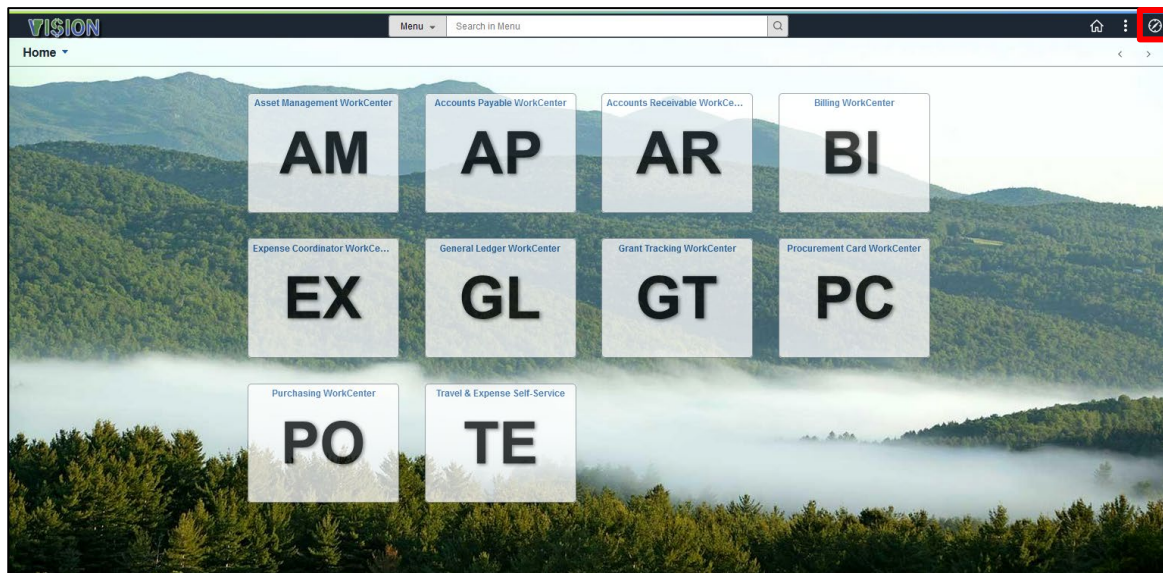
11. Click on the **X** to close the window

You have added a report to the **Reports/Processes Pagelet**:

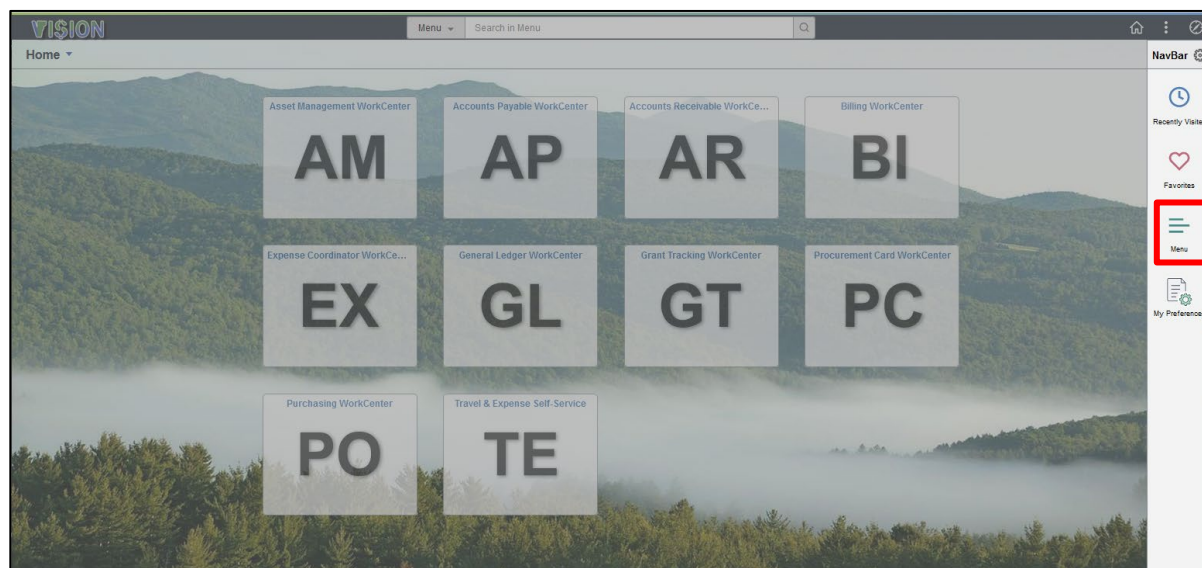


Using the NavBar

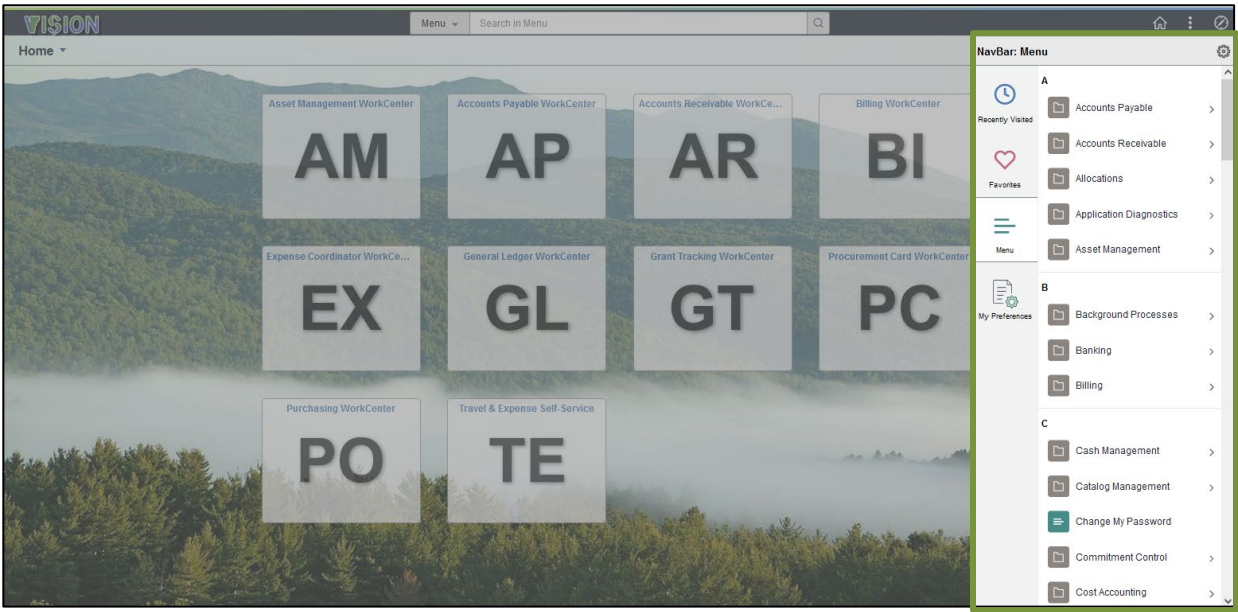
While WorkCenters have been designed to give you easy access to the VISION functionality you will need to accomplish most of your tasks you may also navigate by clicking the **NavBar** Icon:



Click the **Menu** Icon:



The **NavBar Menu** opens, sorted alphabetically. Scroll and drill down to the functionality you want and click on the link:



Page Navigation

The screenshot shows the 'Requisitions' page with a dark header bar containing a '< Home' button and the page title 'Requisitions'. Below the header, the page title 'Requisitions' is repeated. A sub-header 'Use the following search to look for an existing Requisition' is followed by a search bar containing two buttons: 'Find an Existing Value' and 'Add a New Value'. A blue circle with the number '1' is placed over this search bar. Below the search bar is a 'Search Criteria' section with a dropdown arrow. It contains several search criteria: '*Business Unit' with a dropdown set to '=' and a text input '01110'; 'Requisition ID' with a dropdown set to 'begins with' and an empty text input; 'Requisition Name' with a dropdown set to 'begins with' and an empty text input; 'Requisition Status' with a dropdown set to '=' and a dropdown menu; 'Origin' with a dropdown set to 'begins with' and a text input; 'Requester' with a dropdown set to 'begins with' and a text input; and 'Requester Name' with a dropdown set to 'begins with' and a text input. Below these are checkboxes for 'Hold From Further Processing' and 'Case Sensitive'. A text input 'Limit the number of results to (n):' is set to '300'. A blue circle with the number '2' is placed over the 'Search' and 'Clear' buttons. Below the search bar is a 'Basic Search' section with a 'Save Search Criteria' button. A blue circle with the number '3' is placed over the 'Find an Existing Value' and 'Add a New Value' buttons at the bottom of the page.

The above screenshot demonstrates several common navigation features:

1. **Tabbed pages** – displayed as folder tabs
2. **Buttons** – action keys displayed as boxes displayed as blue text
3. **Links** – action keys displayed as boxes

Search Features

As you select different modules and activities, often a search screen is presented to find an existing value or to enter a new value. When using “Find an Existing Value”, use all search options available to return the desired results. Below are some search tips.

The screenshot shows the 'Requisitions' search interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below them is a section titled 'Search Criteria' with a dropdown arrow. The search criteria section contains several fields with dropdown menus and text input boxes. A red callout box with a red arrow points to the 'Search Criteria' section, containing the text: 'Select any appropriate check boxes under the search parameters'. The fields include: '*Business Unit' (dropdown), 'Requisition ID' (dropdown), 'Requisition Name' (dropdown), 'Requisition Status' (dropdown), 'Origin' (dropdown), 'Requester' (dropdown), 'Requester Name' (dropdown), 'Hold From Further Processing' (checkbox), 'Case Sensitive' (checkbox), and 'Limit the number of results to (up to 1000)' (text input). The dropdown menus are open, showing options like 'begins with', 'contains', 'not =', '<=', '>=', and 'between'. The 'contains' option is selected for 'Requisition Status'. The 'Search' button is at the bottom left, and the 'Clear' button is at the bottom right.

- In the drop-down box, select **contains** to avoid needing to enter leading zeros.
- Enter as much information as you KNOW is accurate. This will return results that match known criteria but will not exclude possible matches.
- Do not enter information that is not KNOWN as it may exclude match results that are desired.
- Look at the possible **check boxes** on the search screen and select if they are appropriate for your search (some will be highlighted in module manuals).

Voucher

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

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Business Unit: 01110

Voucher ID: begins with

Invoice Number: begins with

Invoice Date: begins with

Short Supplier Name: begins with

Supplier ID: begins with

Supplier Name: begins with

Voucher Style: begins with

Related Voucher: begins with

Entry Status: Postable

Voucher Source:

Incomplete Voucher:

☐ Case Sensitive

Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

300 of 8396 results are displayed.

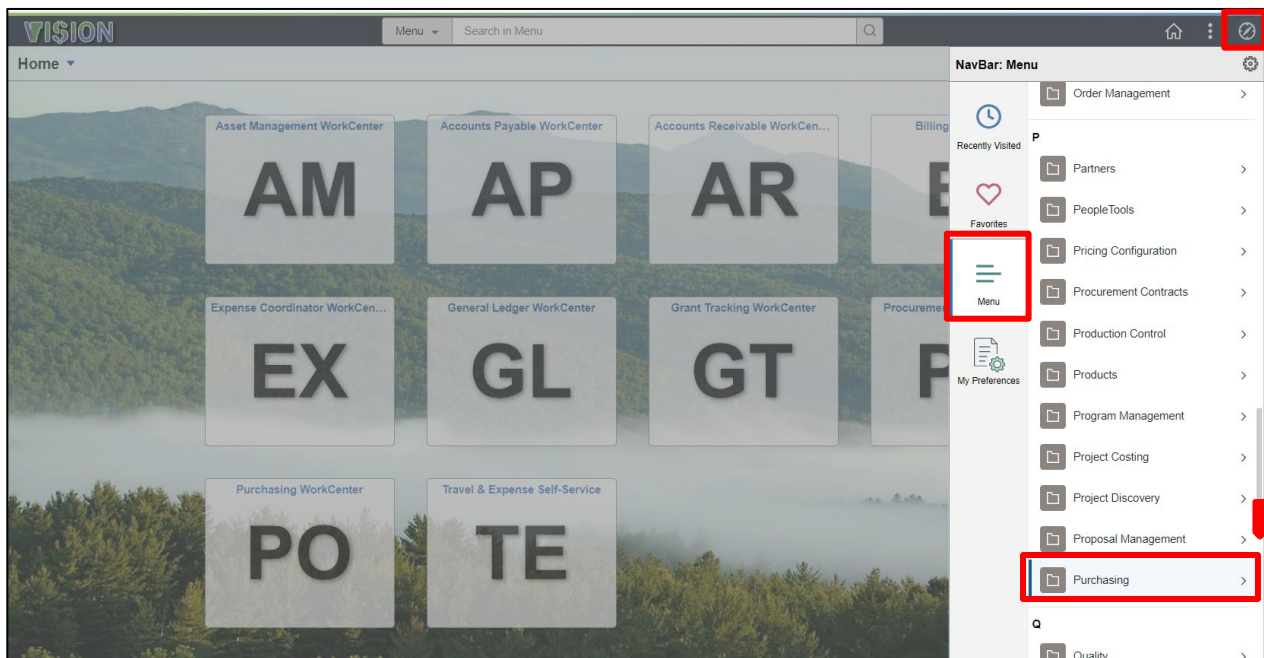
[View All](#)

Business Unit	Voucher ID	Invoice Number	Gross Invoice Amount	Payment Amount	Invoice Date	Short Supplier Name	Supplier ID	Supplier Name	Voucher Style	Related Voucher	Entry Status	Voucher Source	Incomplete Voucher
01110	00008610	70026780	2486	2486	08/21/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008609	70026568	2992	2992	07/13/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008608	70026234	1232	1232	06/09/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008607	70026014	572	572	05/19/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008606	70025797	1364	1364	04/20/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008605	70025519	3080	3080	03/20/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008604	70025248	6072	6072	02/17/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008603	70024997	9372	9372	01/20/2023	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008602	70023237	12430	12430	06/17/2022	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete
01110	00008601	70020027	-88	-88	04/26/2021	AGENCY OF-003	0000043671	Agency of Digital Services-CIT-Cust Supp	Regular	(blank)	Postable	Online	Complete

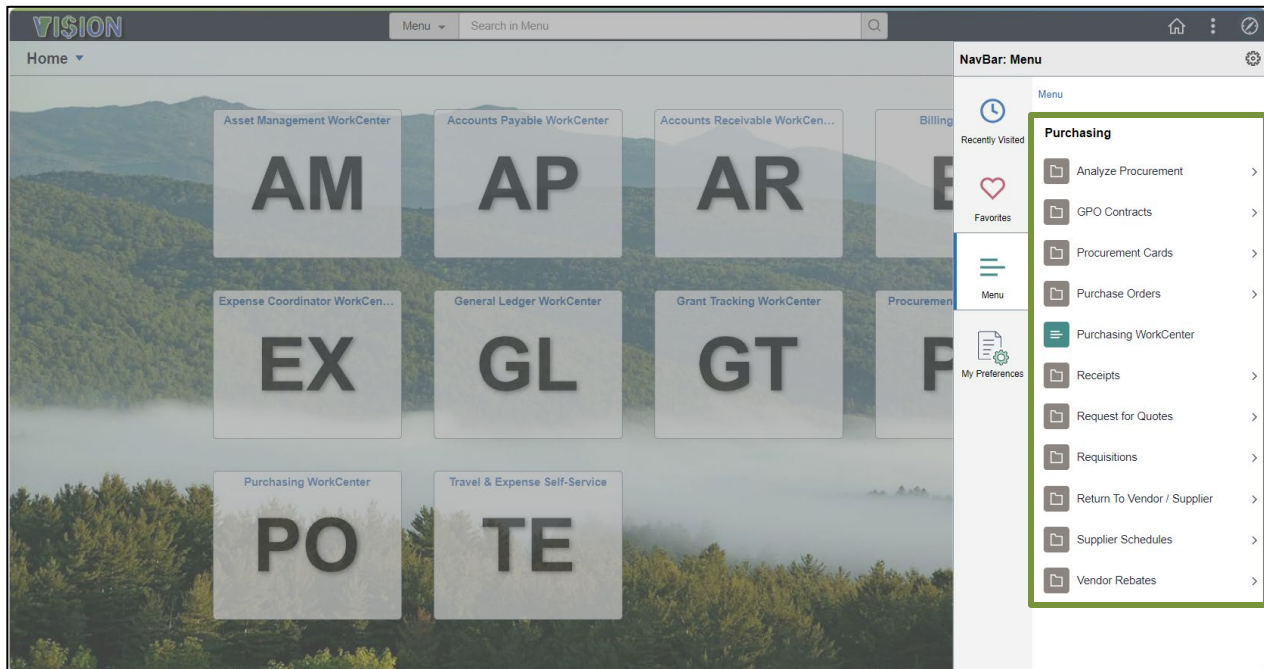
- Searches will return a maximum of 300 rows
- Clicking on a column heading over a list of data will sort the data in ascending/descending order
- Click **View All** to display all available rows

Links, Icons, Buttons, and Mandatory Fields

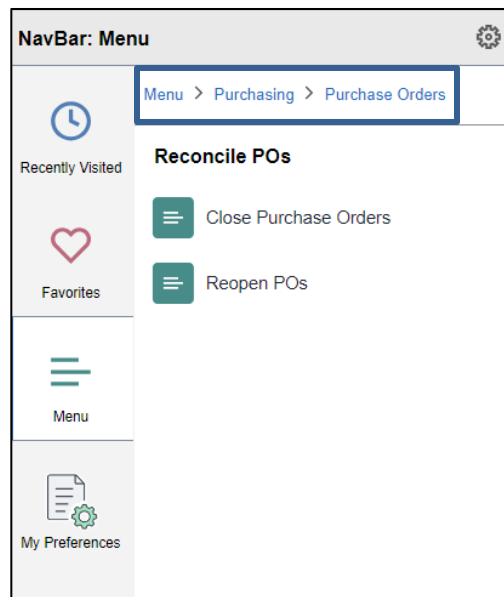
The most effective way to navigate in PeopleSoft 9.2 is to use WorkCenters. WorkCenters provide links to the functionality you will need within a module without having to drill down through a menu. You can also navigate using the **NavBar** Tool by clicking the **NavBar** icon, then the **Menu** icon, scroll down, and then the **Purchasing** link:



This brings up a menu of options within the Purchasing module, you can continue drilling down until you find what you're looking for.



As you drill down, you will notice that a string of “breadcrumbs” appears at the top of the menu. You can navigate anywhere in the string by clicking on the link without having to go back to the start of the menu.



You can use either **tabs** or **links** to navigate within a page:

The screenshot shows the 'Purchase Order' form. At the top, there is a navigation bar with a '< Home' button and the title 'Purchase Order'. Below this, the form has two tabs: 'Find an Existing Value' (active) and 'Add a New Value'. The form contains input fields for '*Business Unit' (with '01110' entered) and '*PO ID' (with 'NEXT' entered). An 'Add' button is located below these fields. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'. A blue callout box with arrows pointing to the tabs and links contains the text: 'Tabs or Links get you to the same place'.

Leave **PO ID** blank to see all POs for a business unit:

The screenshot shows the 'Purchase Order' search criteria form. It includes a header with 'Purchase Order' and instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (active) and 'Add a New Value'. A 'Search Criteria' section contains various search fields: '*Business Unit' (dropdown with '01110'), 'PO ID begins with' (text input, highlighted with a red box), 'Purchase Order Date' (dropdown), 'PO Status' (dropdown), 'Short Supplier Name' (dropdown), 'Supplier ID' (dropdown), 'Supplier Name' (dropdown), 'Buyer' (dropdown), 'Buyer Name' (dropdown), 'PO Type' (dropdown), and 'Purchase Order Reference' (dropdown). There are also checkboxes for 'Hold From Further Processing' and 'Case Sensitive', and a text input for 'Limit the number of results to (up to 300):' with '300' entered. At the bottom are 'Search' and 'Clear' buttons, and links for 'Basic Search' and 'Save Search Criteria'.

Lick on a link to display a PO:

Search Results

View All

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
01110	0000001069	10/11/2023	Dispatched	NWN CORPOR-001	0000344287	NWN Corporation	AHILL3	Alicia R Bowen	General	Statewide Voice over IP Contra	N
01110	0000001068	10/03/2023	Dispatched	IVALUA INC-001	0000380534	Ivalua Inc.	AHILL3	Alicia R Bowen	General	CPS eProcurement System	N
01110	0000001067	09/12/2023	Dispatched	NWN CORPOR-001	0000344287	NWN Corporation	AHILL3	Alicia R Bowen	General	Statewide Voice over IP Contra	N
01110	0000001066	08/11/2023	Dispatched	NWN CORPOR-001	0000344287	NWN Corporation	AHILL3	Alicia R Bowen	General	Statewide Voice over IP Contra	N
01110	0000001065	08/09/2023	Dispatched	IVALUA INC-001	0000380534	Ivalua Inc.	AHILL3	Alicia R Bowen	General	CPS eProcurement System	N
01110	0000001064	07/26/2023	Dispatched	IVALUA INC-001	0000380534	Ivalua Inc.	AHILL3	Alicia R Bowen	General	CPS eProcurement System	N
01110	0000001063	07/11/2023	Dispatched	NWN CORPOR-001	0000344287	NWN Corporation	AHILL3	Alicia R Bowen	General	Statewide Voice over IP Contra	N
01110	0000001053	03/27/2023	Dispatched	KPMG LLP-001	0000012873	KPMG LLP	SGREAVES	Suzette M Greaves	General	CPS ePro Implementation	N

This screenshot contains some examples of links, icons, and buttons:

The screenshot displays a 'Maintain Purchase Order' interface. At the top, a 'Home' link is on the left, and 'Add/Update POs' is on the right. The main section is titled 'Purchase Order' and contains various input fields and links. Callouts highlight specific features:

- Mandatory fields:** A callout box points to fields marked with an asterisk (*), such as *PO Date, *Supplier, *Supplier ID, and *Buyer. The text states: "Mandatory fields are marked by an asterisk. Additional fields may be required by your department's procedures."
- Change Order icon:** A callout box points to a blue triangle icon with a red 'X' next to it, labeled "Change Order icon".
- Line Details icon:** A callout box points to a small icon in the 'Line' column of the table, labeled "Line Details icon".
- Schedule icon:** A callout box points to a small icon in the 'Status' column of the table, labeled "Schedule icon".
- Function buttons:** A callout box at the bottom points to a row of buttons: Save, Return to Search, Previous in List, Next in List, Notify, and Refresh. The text states: "At the bottom of each page are function buttons (i.e., Save, Return to Search, Previous in List, Next in List, Refresh, etc.)"

The interface also includes an 'Amount Summary' section with a 'Calculate' button, a 'Select Lines To Display' section with a 'Retrieve' button, and a table with columns: Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, Status, and Actions.

Chart of Accounts Overview

Oracle/PeopleSoft stores chart of account information in segmented fields called **chartfields**. The State of Vermont will be utilizing the following seven (7) chartfields; Business Unit (required), Account (required), DeptID (required), Fund (required), Program (optional), Project/Grant (optional) and Class (optional). The chartfield values are used throughout the entire system, meaning the values entered on a voucher to pay a bill would be the same values that ultimately are recorded in the general ledger. Each of the chartfields will be discussed in detail below. The policies and procedures governing updates and changes to the chartfield values will also be addressed in this section.

Chartfield Summary and Definitions

	CHARTFIELD NAME							
	Business Unit	Account	Fund	Dept ID	Program	Class	Project	Affiliate
Length	5	6	5	10	5	5	≤ 15	5
Use	Who	What	How	Who	What	Why	Why	Who
Required?	Always	Always	Always	Always	Optional	Optional	Both	Both

Business Unit - *Required*:

Broadly defined as an operating unit (department, office, or board) established statutorily or administratively. Business units can be individual departments or divisions that need to segregate their financial data for accounting purposes or operational centers that segregate their operations for management purposes, including security.

In VISION, a business unit is a component of security and thus can define a level of control that is significant and appropriate to the module you use. For example, General Ledger business units are typically departments; Payables business units define rules for paying bills and security access to charge expenditures; Receivables business units define rules for receiving payments. Each business unit shares the same configuration in a specific module; this configuration governs processing and accounting rules. You can share business units across any combination of modules or define them within just one module. If your entire organization keeps only one set of books, you can use one business unit across all modules. Departments with many operating units may use multiple business units for one or all the sub-modules (i.e., multiple business units for Accounts Payable or Purchasing) and still have only one General Ledger business unit.

Following are important concepts to remember regarding Business Units:

- Business Units are 5 numeric characters long.
- Business Units are logically grouped in ranges to facilitate tree building and maintenance, as well as to allow spacing for future Business Unit additions.
- Transactions are stored by Business Unit. Users only have security access to the Business Unit(s) for their department/agency. Your Business Unit value can default in where it is required based on your Operator Preferences.

The first two digits are aligned in the following manner:

General Government	01
Protection, Persons, etc.	02
Human Services	03
Employment and Training (Labor)	04
General Education	05
Natural Resources	06
Commerce and Development	07
Transportation	08
Component Units	09

Account - Required:

Account chartfield classifies the nature of operational transactions. It holds the detail coding values for assets, liabilities, equity, revenues, and expense/expenditure transactions.

The Account field is 6 numeric characters long. Accounts are numbered according to the following convention:

Assets	1XXXXX
Liabilities	2XXXXX
Fund Equity	3XXXXX
Revenues	4XXXXX
Expenses	5XXXXX
Expenses (AHS Grant Exp)	6XXXXX
Other Financing Sources	70XXXX
Other Financing Uses	72XXXX

Fund - Required:

Fund chartfield maintains the fiscal and accounting entities in which financial resources and the use of those resources are grouped according to statute, regulation, or current accounting standards.

Fund Chartfield Numbering Scheme:

- The fund chartfield is five digits long (all numeric)
- Funds are shared across the State (i.e. they will be stored under a SetID = STATE)

Commonly used funds across State Government:

10000	General Fund
20105	Transportation Fund
20205	Education Fund
20405	Global Commitment Fund
21%	Special Funds
22%	Federal Funds
3%	Bond Funds
4%	Permanent Funds
5%	Internal Service & Enterprise Funds
60%	Pension Trust Funds
63%	Agency Funds
64%	Agency Funds

Department (Dept ID) - Required:

The DeptID Chartfield contains the operational unit subdivisions.

Chartfield Numbering Scheme:

- DeptID's are 10 characters long and numeric.
- The first four digits are the same as the **LAST** four of the GL Business Unit number, except for BGS capital constructions dept ID's.

Program: (required for some departments)

Program Chartfield maintains a description and a set of objectives toward which activities and resources are directed.

- The program chartfield is five digits long.
- Under Set ID = STATE so they can be shared across business units.

Class:

The Class Chartfield will be used to track activities relating to programs and across program lines based on departmental, administrative, or legislative needs.

- The class chartfield is five digits long.
- Under Set ID = STATE so they can be shared across business units.

Project:

The Project Chartfield captures and controls project or grant information to which funding sources are applied.

- Project ID's are up to fifteen characters long and can have any combination of numbers and/or letters.
- Under Set ID = Business Unit so they **cannot** be shared among business units. The same project cannot be located under different Set ID's.
- Can be used to only **track** expenditures or can be used to **control** expenditures by defining a budget specific to the project with the use of a funding source.

The Finance and Management website has a listing of all Business units and Chartfields located on the following link:

<http://finance.vermont.gov/training-and-support/vision-chartfields-and-accounting-periods>

Accounting Periods and Budget Periods

The State of Vermont fiscal year starts July 1st and ends June 30th. Accounting period refers to a month/date range in the fiscal year.

ACCOUNTING PERIOD	DATE RANGE	FISCAL YEAR / BUDGET PERIOD
0	Carry Forward	2024
1	JUL 1-31, 2023	2024
2	AUG 1-31, 2023	2024
3	SEP 1-30, 2023	2024
4	OCT 1-31, 2023	2024
5	NOV 1-30, 2023	2024
6	DEC 1-31, 2023	2024
7	JAN 1-31, 2024	2024
8	FEB 1-29, 2024	2024
9	MAR 1-31, 2024	2024
10	APR 1-30, 2024	2024
11	MAY 1-31, 2024	2024
12	JUN 1-30, 2024	2024
998*	JUN 30, 2024	2024
1	JUL 1-31, 2024	2025

* Period 998 is an adjustment period used to capture all year end adjusting and correcting entries for the year just ended. A June 30th date is used on most period 998 transactions.

Budget Check Errors

This table of budget check errors may be encountered in any module where budget checking is processed.

DESCRIPTION	EXPLANATION
Exceeds Budget Tolerance	There is not enough spending authority in the budget to post the transaction.
No Budget Exists	There is no organization budget OR appropriation and organization budget set up for the fund and DeptID combination used on the transaction.
Budget is Closed	The transaction is trying to post to a closed prior year budget.
Budget Date is Out of Bounds	The accounting date on the transaction is either in a future period or prior fiscal year that is closed.
Spending Authority Over Budget	A credit transaction to an expense account will cause the spending authority to exceed the original budgeted amount (i.e., there are not enough expenditures in the current year to offset the credit.)
Budget Date is Outside Specified Dates	The transaction is trying to post to a budget that is no longer available to be posted to.

DeptID Search/Selection (Example)

Cost / Asset Information

Asset Information

Unit 01110 Asset ID NEXT

Profile ID Trans Date 11/06/2023

Description Acctg Date 11/06/2023

Location Trans Code

Tag Number Currency USD

☐ Accum Depr in Current Pd Rate Type CRRNT

Asset Cost Information Find | View All First 1 of 1 Last

Book Name Quantity Cost Salvage

ASSETS 1.0000 0.00 USD 0.00 USD

Category Cost Type Accum Depr YTD Depr

 0.00 0.00 USD Default Profile

Chartfields Personalize | Find | View All | First 1 of 1 Last

Fund Dept Program Class Project

▶ **Asset Additional Information**

Save Notify Add

Click the magnifying glass

Look Up Dept

*SetID STATE

Department begins with 1100

Manager Name begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results of a possible 5811 can be displayed.

View 100 First 1-300 of 300 Last

Department	Description	Manager Name
0003000000	F&M - Fin Ops - Administrative	(blank)
0118000000	Buildings & Gen Serv - Capital	(blank)
0122500000	Legislative Info Technology	(blank)
0126600000	Vermont Pension Investment Com	(blank)
0334000000	Office of the Child, Youth and	(blank)
0367500000	VT Offender Work Program	(blank)
1100010000	Secretary of Administration	(blank)
1100010100	SOA OPS	(blank)
1100010200	RMP GRANTS	(blank)
1100010300	ECONOMIC RECOVERY	(blank)
1100010400	STATE FISCAL STABILIZATION	(blank)
1100010500	CONNECT VT	(blank)
1100010600	SOA HEALTH CARE REFORM	(blank)
1100010700	Racial Equity Advisory Panel	(blank)
1100020000	Secretary of Administration	(blank)
1100020100	SOA Operating	(blank)
1100020600	SOA - Health Care Reform	(blank)
1100020700	VTHR OPERATIONS	(blank)
1100030000	Pay Plan Adjustment	(blank)
1100040000	Geographic Information Service	(blank)
1100050000	Independent Health Care Comm	(blank)
1100060000	VT Agricultural Credit Corp	(blank)
1100070000	Vt Renewable Energy Authority	(blank)
1100080000	Challenges for Change	(blank)
1100090000	SOA Finance	(blank)
1100100000	SOA - Workers Comp Insurance	(blank)
1100109000	AoA-Workers' Compensation Ins.	(blank)
1100110000	SOA-General Liability Insurance	(blank)
1100119000	AoA-General Liability Ins.	(blank)
1100120000	SOA - All Other insurance	(blank)
1100120000	SOA - All Other insurance	(blank)

All Dept IDs are displayed. To view Dept IDs for your BU only, enter the first four digits of your BU (omitting the leading 0) and click on Look Up. This can also be done by entering the first four digits in the Dept field before clicking the magnifying glass.

Clearing your Browser Cache

VISION is a web-based application that requires periodic maintenance to assist in the efficient running of the system. Clearing the computer's cache (also called deleting temporary Internet Explorer files) is a frequently used maintenance tool.

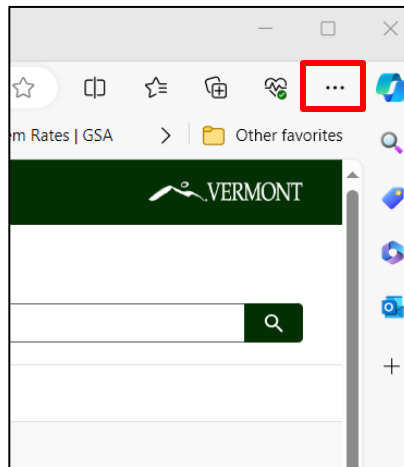
Your use of the web determines how often the cache should be cleared. A good practice is to clear cache at least once a week to avoid error messages such as "Page Cannot Be Displayed" when trying to log in or "invalid URL" when navigating. If you receive either of these messages, follow these steps before calling VISION Support.

Microsoft Edge

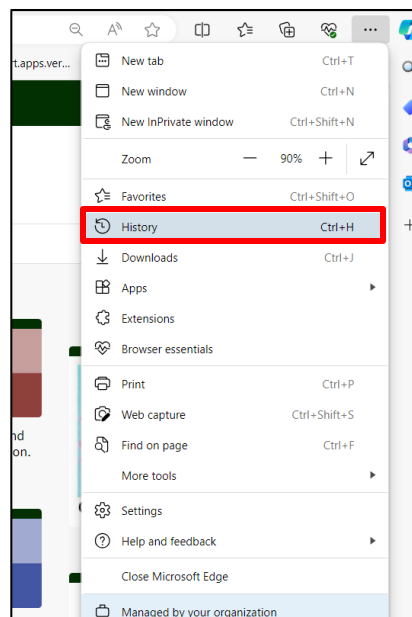
Note: Any questions about your computer should be directed to your desktop support staff.

Step 1 – Open Edge

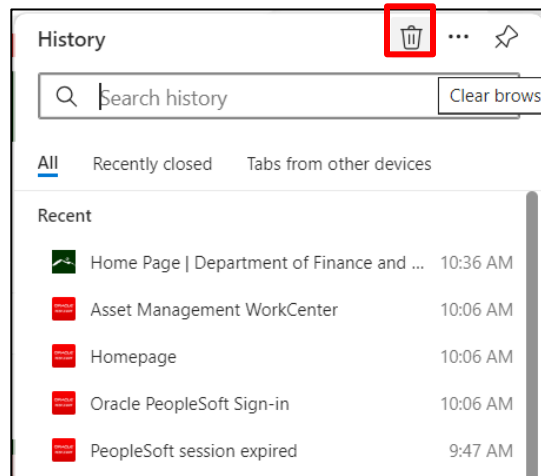
Step 2 – Click on the **Three horizontal dots**



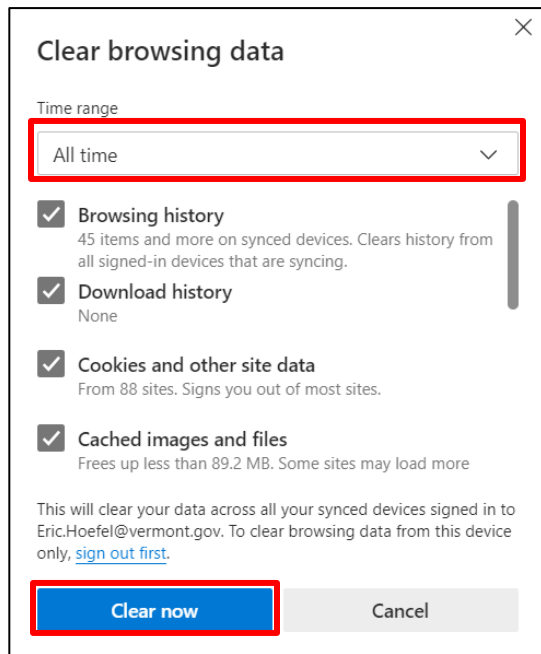
Step 3 – Click on **History**:



Step 4 – The History window opens, click on **Clear browsing data**:



Step 5 – The Clear Browsing data window opens, Select **All Time** as the **Time range** and at a minimum, **Browsing history**, **Cookies and other site data**, and **Cached images and files** and click on **Clear now**:



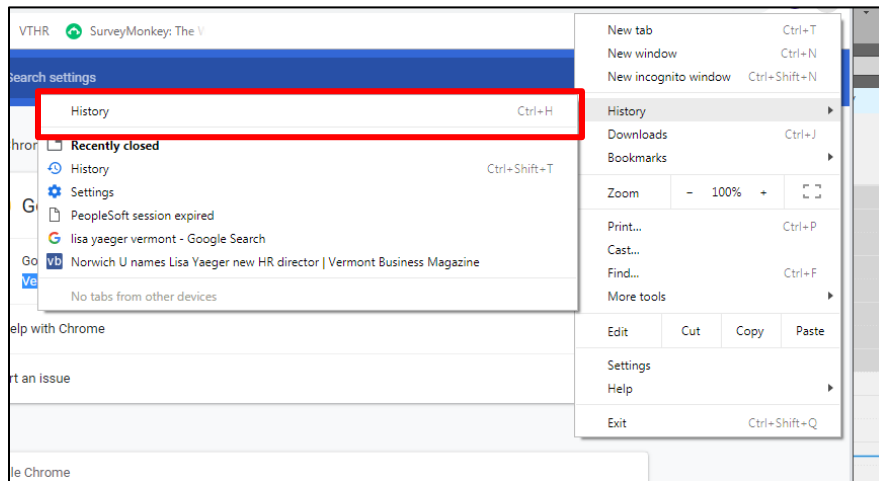
Google Chrome

Note: The version of Chrome on your computer may look different, but the concept is the same. Any questions about your computer should be directed to your desktop support staff.

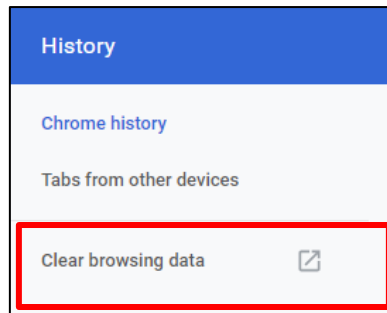
Step 1 – Click on the **three dots** in the upper-right corner:



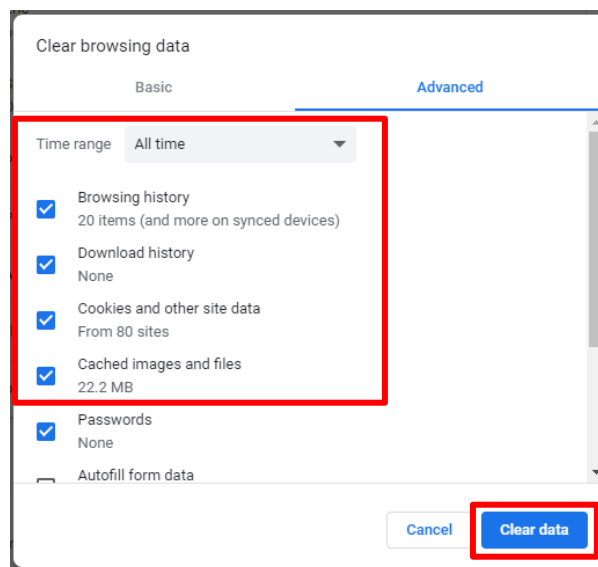
Step 2 – Hover over History and click on **History** in the pop-up window:



Step 3 – Click on **Clear browsing data**:



Step 4 – Select the data you want to clear (Browsing history; Download history; Cookies and other site data; and Cached images and files at minimum) and click **Clear Data**:

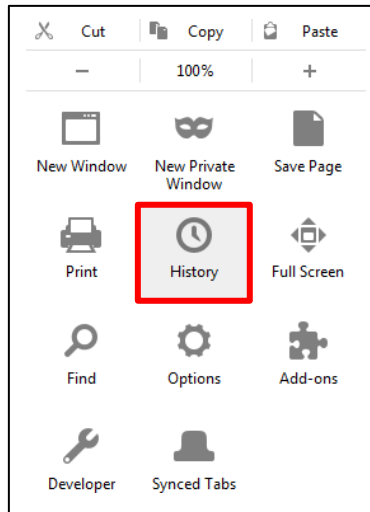


Mozilla Firefox

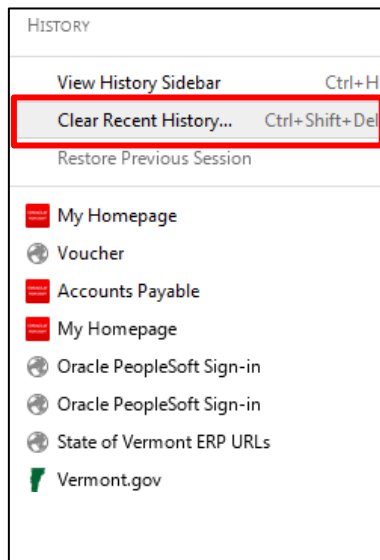
Step 1 – Click on the **three-bar icon** in the upper-right corner:



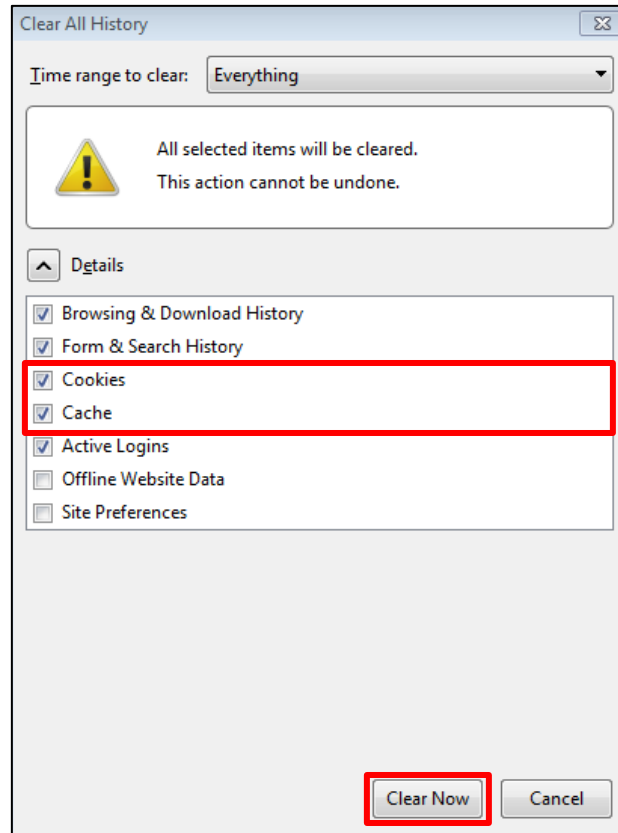
Step 2 – Click on **History**:



Step 3 – Click on **Clear Recent History**:



Step 4 – Select the data you want to clear (Cookies and Cache at minimum) and click on **Clear Now**:

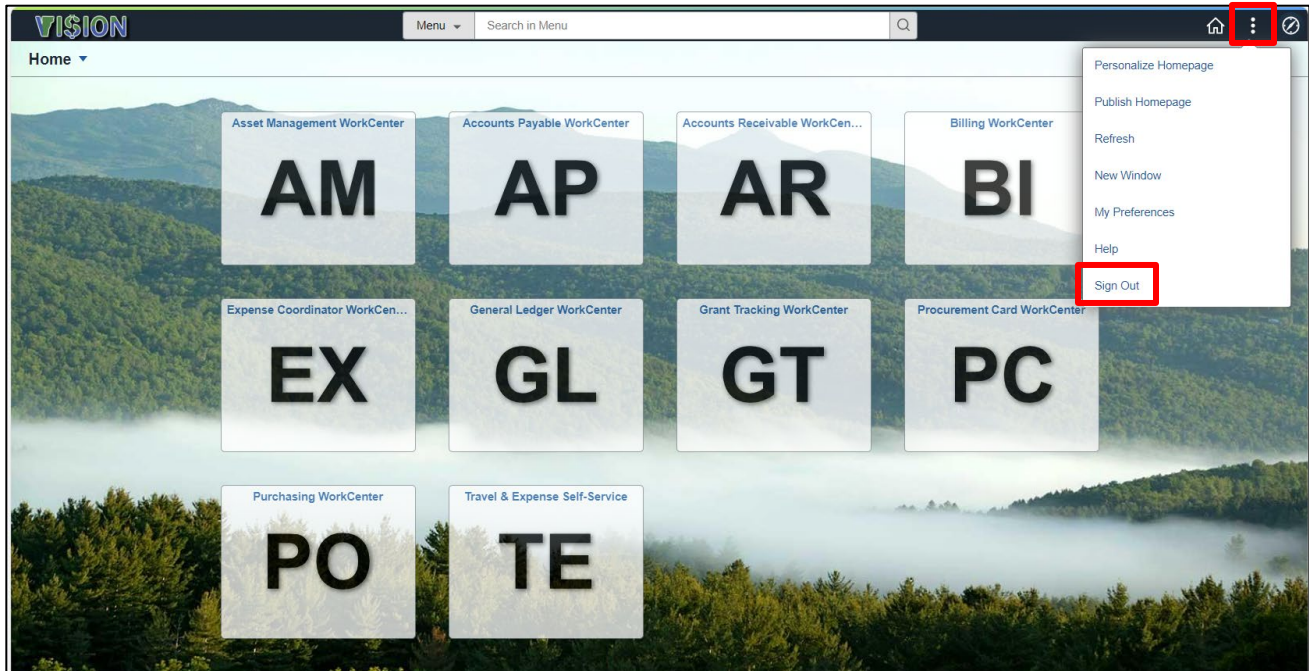


A keyboard shortcut that works in most browsers is **Ctrl + Shift + Delete**. You can also set most browsers to clear the cache whenever you close the browser.

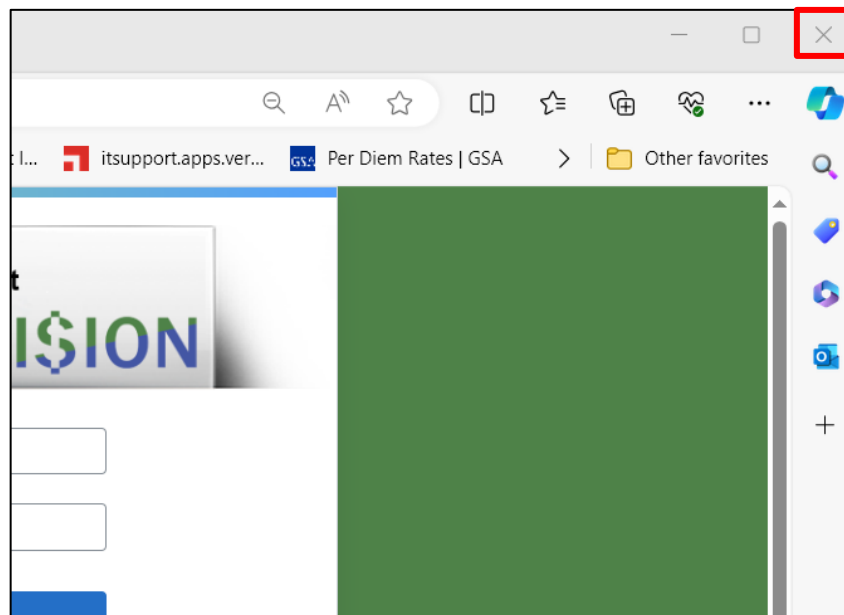
Following these steps will clear the internet files and most often removes any cause of error messages. If this does not resolve the issue, contact VISION Help Desk at 828-6700, option 2.

Logging Out

Before logging out, be sure that all your work is saved or processed. Click on the **Actions List** Icon then click **Sign Out**:



















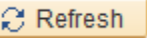
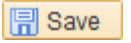
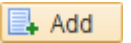
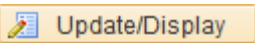
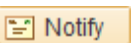
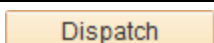
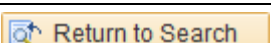
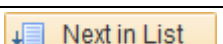
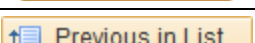


Exit from the browser:



Following these steps ensures that your login has completely disconnected from the PeopleSoft applications and servers.

Icons and Buttons Glossary

	Change Order - To initiate the change order process on PO
	Calendar - Opens a calendar
	Line Details/Schedule Details - To view/update the line/schedule details of a PO. Whether its line or schedule details is determined by the page the icon is accessed from
	Line Comments - To enter/view comments relating to a specific line of a transaction
	Schedule - To access the schedule information of a PO
	Add Rows - To insert additional rows in a transaction Delete
	Delete Rows - To delete rows from a transaction
	Distributions/Chartfields - To access the distribution information in a PO
	Help - Click for Help within a page
	Budget Check - Run a budget check for a transaction Item
	Search - Used to find items for a PO
	Download - Download to an Excel spreadsheet
	Ship To Address - To view the existing Ship To Address or to enter a One-Time Address
	Cancel - To cancel a transaction
	Spell Check Comments - To spell check comments in transactions Look Up
	Look Up - To view previously defined values for a field
	Requisitions - To view the requisition that a PO came from, if applicable
	Processing Circle (a.k.a. the spinning wheel of doom)
 Refresh	To refresh a transaction on your page
 Save	To save a transaction
 Add	To add a new transaction
 Update/Display	To update/display a transaction
 Notify	This button is not currently used in VISION
 Dispatch	To dispatch a PO
 Return to Search	Return to the search functionality of the page
 Next in List	Move to the next item in the list
 Previous in List	Move to the previous item in the list

Process	Process a transaction such as a journal
Submit	Submit – Submit a transaction for approval
Calculate	This button is not currently used in VISION