



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

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Revisions to Manual

January 2019

- Manual written

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 with the 'Add a New Value' tab selected. The form contains the following fields and values:

- Request ID: NEXT
- SetID: STATE
- Field Name: ACCOUNT
- Field Action: Add
- Field Value: 551001

An 'Add' button is located below the fields. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

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

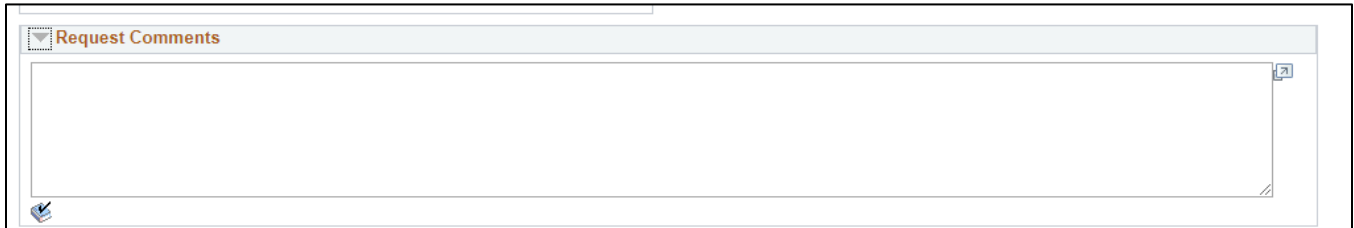
Monetary Account Type – Select the appropriate account type from the drop-down menu

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.

A screenshot of a web form section titled "Request Comments". The title is in a light blue header bar with a small downward arrow icon on the left. Below the header is a large, empty white rectangular text area. In the bottom-left corner of the text area, there is a small blue icon of a document with a pencil. In the bottom-right corner, there is a small icon of a document with a checkmark.

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 ACCOUNT
Field Action Add	*Field Value CF40XA
Telephone	Email ID eric.hoefel@vermont.gov
*Business Unit 02100	

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

*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 Test text

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

Answer Test text

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

Answer N/A

4. Any additional comments about this request?

Answer Test text

Trees

Requester

Entered By

Updated By

Entered Date/Time

Updated Date/Time

Save

Notify

Add

Update/Display

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

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	SetID	STATE	Copy
Request Status	Newly Created	Field Name	ACCOUNT	
Field Action	Add	*Field Value	CF40XA	
Telephone		Email ID	eric.hoefel@vermont.gov	
*Business Unit	02100			
Core Information		Business Justification		
<input type="checkbox"/> Control Account		Attachments (1)		
<input type="checkbox"/> Statistical Account				
*Effective Date		07/01/2018		
*Status		Active		
Monetary Account Type		R		
Unit of Measure				
*Description		Test Account		
*Short Description		TestAcct		
Long Description				
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	SetID	STATE	Copy
Request Status	Pending Approval	Field Name	ACCOUNT	
Field Action	Add	*Field Value	CF40XA	
Telephone		Email ID	eric.hoefel@vermont.gov	
*Business Unit	02100			
Core Information		Business Justification		
<input type="checkbox"/> Control Account		Attachments (1)		
<input type="checkbox"/> Statistical Account				
*Effective Date		07/01/2018		
*Status		Active		
Monetary Account Type		R		
Unit of Measure				
*Description		Test Account		
*Short Description		TestAcct		
Long Description				
Request Comments				
Questions				
Trees				
Request Action				
		Go View Approval Flow		
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 3:47PM		
Save		Return to Search		Add Update/Display
Notify				

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	

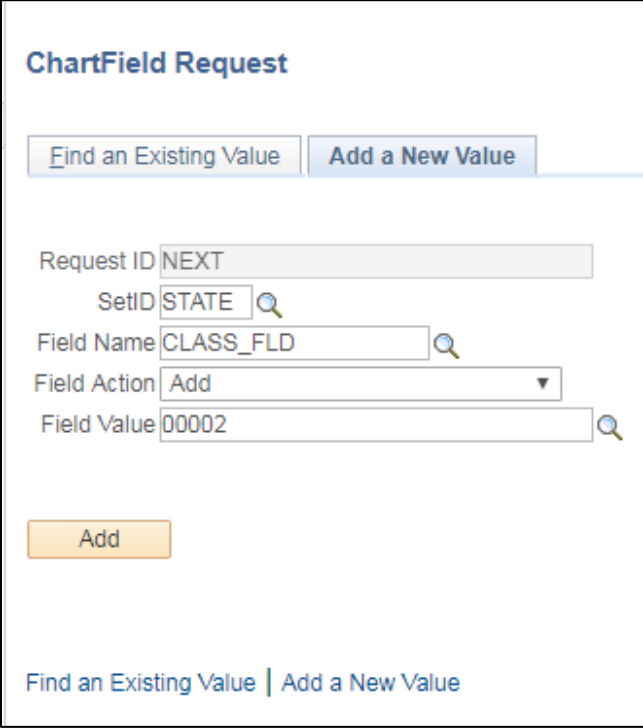
Completing a ChartField Request Form for a Class Code

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' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, the form contains several input 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, there is an 'Add' button. At the bottom right, there are links for 'Find an Existing Value' and 'Add a New Value'.

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	SetID	STATE
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		

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

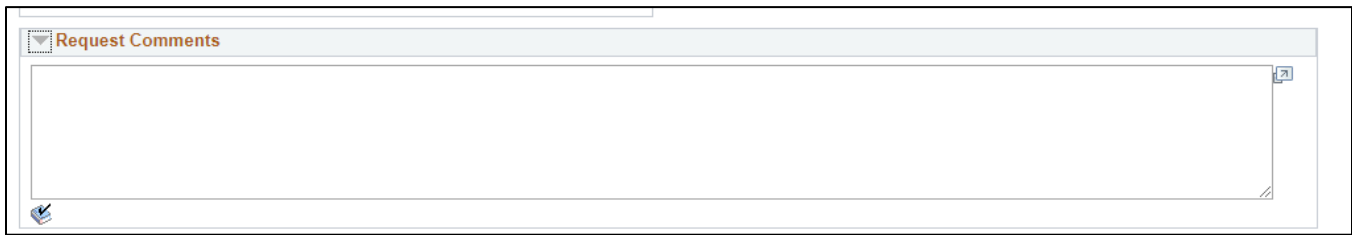
Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

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.

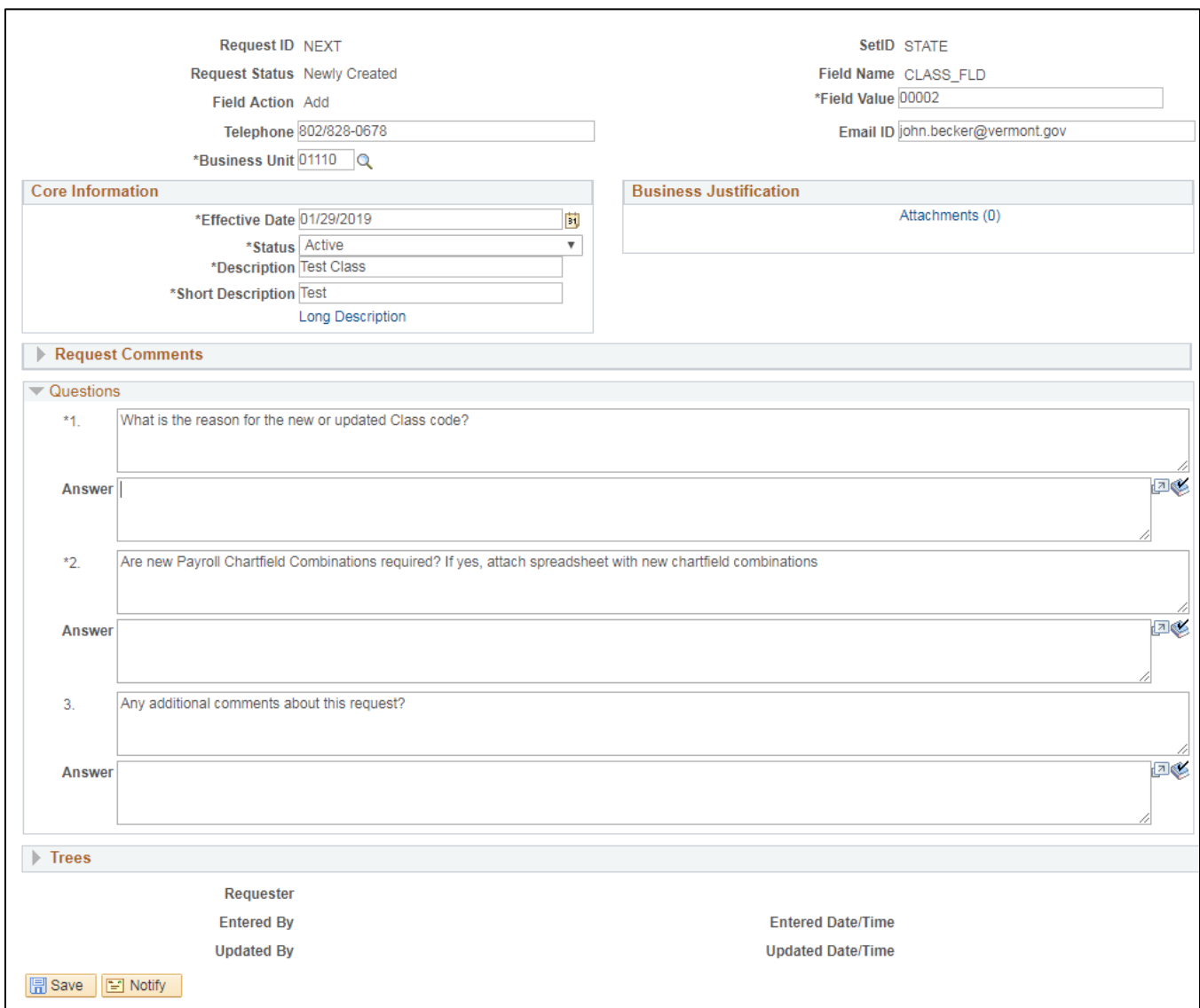
Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.



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 and a small icon in the bottom left corner of the section header.

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 shows the full request form. 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 (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 includes fields for *Effective Date (01/29/2019), *Status (Active), *Description (Test Class), *Short Description (Test), and a link for Long Description. The "Business Justification" section includes a link for Attachments (0). Below these are three sections: "Request Comments", "Questions", and "Trees". The "Questions" section contains three questions with corresponding answer fields. The "Trees" section contains fields for Requester, Entered By, Updated By, Entered Date/Time, and Updated Date/Time. At the bottom left, there are "Save" and "Notify" buttons.

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

Business Justification
Attachments (0)

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

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 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 Action

Go

View Approval Flow

RequesterJBECKER

John M Becker

Entered ByJBECKER

John M Becker

Entered Date/Time01/30/2019 10:30AM

Updated ByJBECKER

John M Becker

Updated Date/Time01/30/2019 10:34AM

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 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' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there are five input 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 '1110002026' and a magnifying glass icon. Below these fields is an orange 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

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
*Effective Date
*Status
*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 VTHR?
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

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)

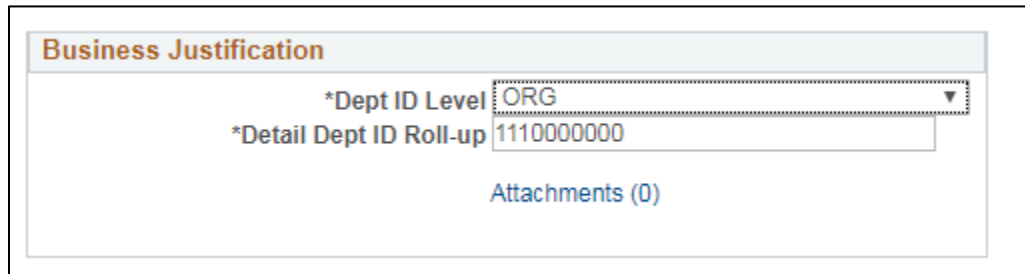
Short Description – Enter a short description (up to 10 characters)

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.

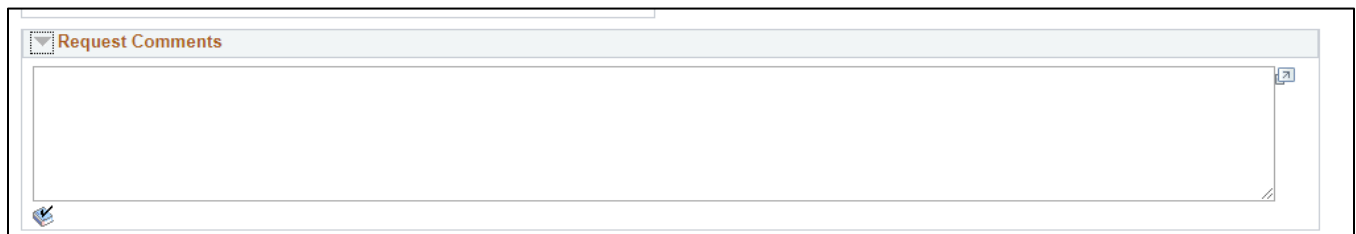
Attributes – Leave blank - only used by VISION Financial Operations

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

A screenshot of a web 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)".

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

A screenshot of a web form section titled "Request Comments" in orange text. The section contains 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	<input type="text" value="1110002026"/>	
Telephone	<input type="text" value="802/828-0678"/>		Email ID	<input type="text" value="john.becker@vermont.gov"/>
*Business Unit	<input type="text" value="01110"/> Q			

Core Information
*Effective Date [\[i\]](#)
*Status [v](#)
*Description
*Short Description
[Long Description](#)
[Attributes](#)

Business Justification
*Dept ID Level [v](#)
*Detail Dept ID Roll-up
[Attachments \(0\)](#)

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	<input type="text" value="1110002026"/>	
Telephone	<input type="text" value="802/828-0678"/>		Email ID	<input type="text" value="john.becker@vermont.gov"/>
*Business Unit	<input type="text" value="01110"/> Q			

Core Information
*Effective Date [\[i\]](#)
*Status [v](#)
*Description
*Short Description
[Long Description](#)
[Attributes](#)

Business Justification
*Dept ID Level [v](#)
*Detail Dept ID Roll-up
[Attachments \(0\)](#)

[Request Comments](#)

[Questions](#)

[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

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 DEPT ID
*Short Description	TEST
	Long Description
	Attributes
Business Justification	
*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

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
<div>Close</div>	

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' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there are five input 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. Below these fields is an orange 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

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 Date01/30/2019

*StatusActive

*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.

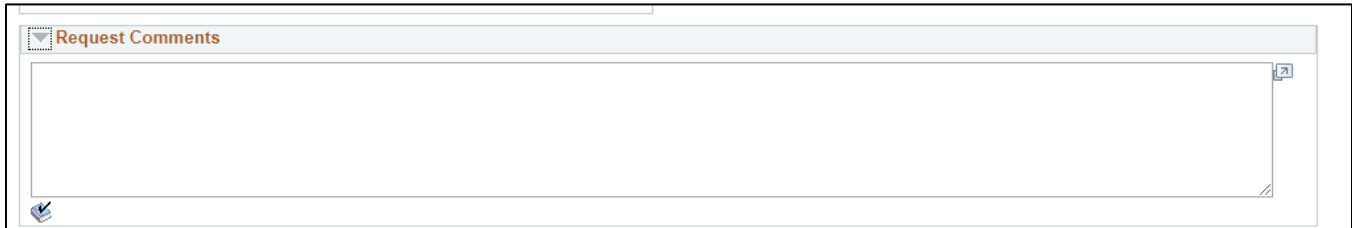
Description – Enter a description (up to 30 characters)

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 blue icon of a document with a pencil. In the bottom-right corner, there is a small icon of a document with a checkmark.

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	000000070	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			

Core Information
*Effective Date 01/30/2019
*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	000000070	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			

Core Information
*Effective Date 01/30/2019
*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	Entered Date/Time 01/30/2019 11:24AM
Updated By	JBECKER	John M Becker	Updated Date/Time 01/30/2019 11:24AM

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

The screenshot shows a web application interface for managing requests. At the top, there's a header with '*Business Unit' set to '01110'. Below this, the interface is divided into several sections:

- Core Information:** Contains fields for '*Effective Date' (01/30/2019), '*Status' (Active), '*Description' (Test Fund), and '*Short Description' (TEST). There are also links for 'Long Description' and 'Attributes'.
- Business Justification:** A section for providing justification, currently showing 'Attachments (0)'.
- Request Comments:** A section for adding comments.
- Questions:** A section for asking questions.
- Trees:** A section for navigating through different request trees.

At the bottom, there's a 'Request Action' dropdown menu, a 'Go' button, and a 'View Approval Flow' link. Below these, there's a table showing request details:

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

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Cancel'.

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

The screenshot shows a window titled 'Approval Flow'. Inside, there's a section for 'Field Request Approval Stage'. The request ID is '0000000007:Pending'. There are links for 'View/Hide Comments' and 'Start New Path'. Below this, there's a 'Path for Fields Approval' section. It shows a 'Pending' status and a list of approvers: 'Multiple Approvers' and 'Chartfield FINOPS Approvers'. There's a '+' icon next to the approvers list. At the bottom, there's a 'Comments' section and a 'Return' button.

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
<div>Close</div>	

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' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are five input fields: 'Request ID' with the value 'NEXT', 'SetID' with the value 'STATE' and a magnifying glass icon, 'Field Name' with the value 'PROGRAM_CODE' and a magnifying glass icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value 'PROG3' and a magnifying glass icon. Below the fields is an orange 'Add' button. At the bottom, there are two links: 'Find an Existing Value' and 'Add a New Value'.

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"/>	Email ID	john.becker@vermont.gov
*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

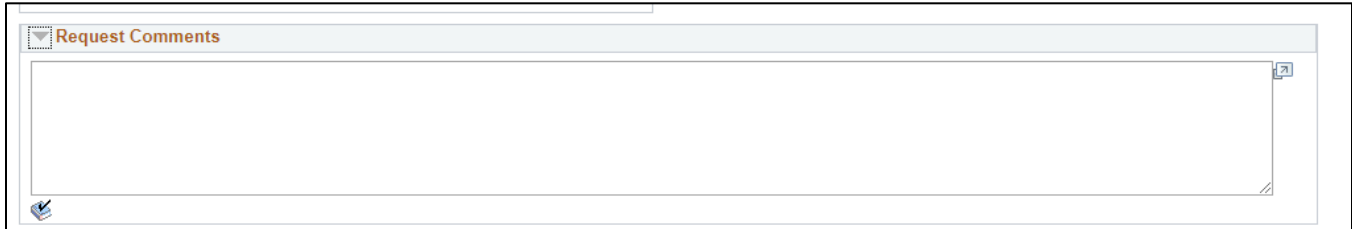
Requests to Inactivate a Project ID should only apply if the Project code is not currently being used in the Asset Module. Run Query: VT_AM_ASSET_LIST to verify that the Project_ID is not associated with an Asset because the Depreciation Process will fail if the Chartfield is inactivated.

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 checkmark icon. 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](#):

Request ID	NEXT	SetID	STATE
Request Status	Newly Created	Field Name	PROGRAM_CODE
Field Action	Add	*Field Value	PROG3
Telephone	<input type="text"/>	Email ID	john.becker@vermont.gov
*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

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	0000000071	SetID	STATE	<input type="button" value="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

*Status

*Description

*Short Description

[Long Description](#)

Business Justification

[Attachments \(0\)](#)

Request Comments

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

Request ID	0000000071	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 Date01/30/2019

*StatusActive

*DescriptionTest Program

*Short DescriptionTest

Long Description

Business Justification

Attachments (0)

Request Comments

Questions

Trees

Request ActionSubmit for Approval

Go

Requester

Entered ByJBECKERJohn M Becker

Entered Date/Time01/30/2019 11:34AM

Updated ByJBECKERJohn M Becker

Updated Date/Time01/30/2019 11:34AM

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

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

Core Information

*Effective Date01/30/2019

*StatusActive

*DescriptionTest Program

*Short DescriptionTest

Long Description

Business Justification

Attachments (0)

Request Comments

Questions

Trees

Request Action

Go

[View Approval Flow](#)

RequesterJBECKERJohn M Becker

Entered ByJBECKERJohn M Becker

Entered Date/Time01/30/2019 11:34AM

Updated ByJBECKERJohn M Becker

Updated Date/Time01/30/2019 11:35AM

[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' form with the 'Add a New Value' tab selected. The form contains the following fields and values:

Field	Value
Request ID	NEXT
SetID	01110
Field Name	PROJECT_ID
Field Action	Add
Field Value	TESTPROJECTID1

At the bottom of the form, there is an 'Add' button and a link to 'Find an Existing Value | Add a New Value'.

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

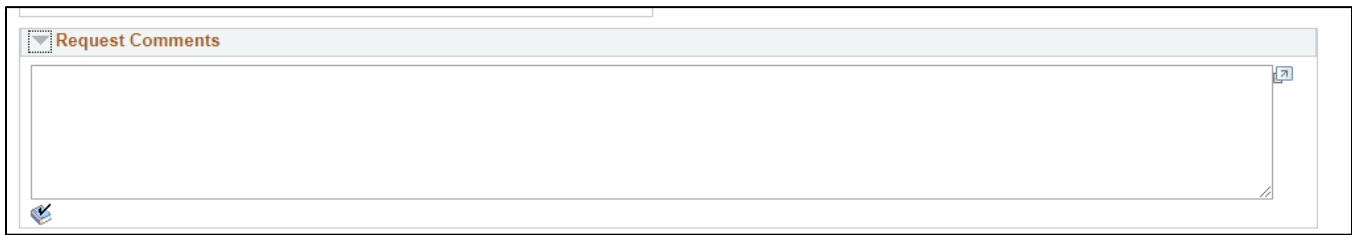
Start Date – Enter the start date for the Project ID

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)

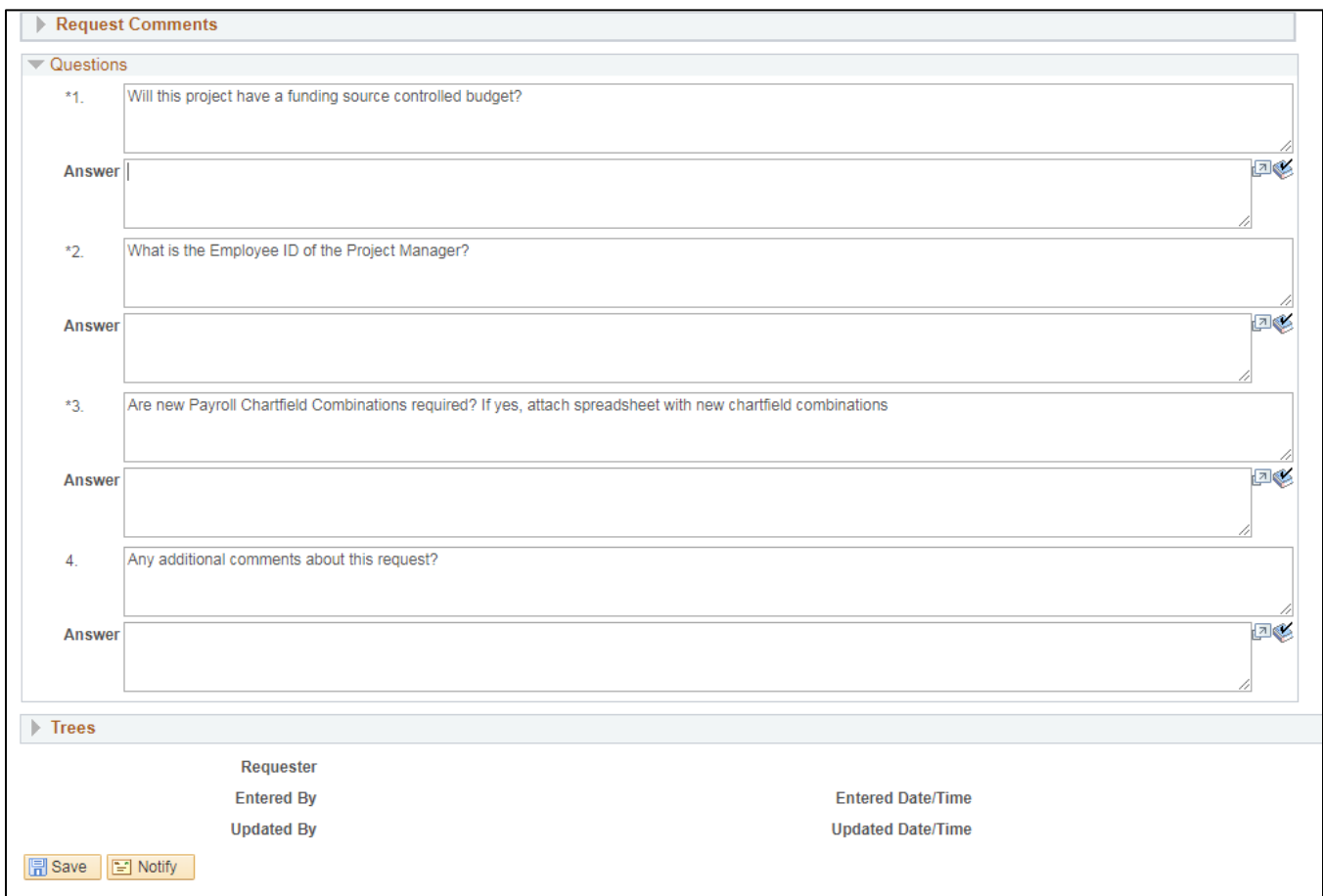
Request Comments – Expand the **Request Comments** box – this is an optional field to add any relevant comments.



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 and a small icon in the bottom left corner of the section header.

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 shows two sections: "Questions" and "Trees".

Questions Section:

- Question 1: "Will this project have a funding source controlled budget?"
Answer: [Empty text field]
- Question 2: "What is the Employee ID of the Project Manager?"
Answer: [Empty text field]
- Question 3: "Are new Payroll Chartfield Combinations required? If yes, attach spreadsheet with new chartfield combinations"
Answer: [Empty text field]
- Question 4: "Any additional comments about this request?"
Answer: [Empty text field]

Trees Section:

This section is currently empty. It contains labels for "Requester", "Entered By", "Updated By", "Entered Date/Time", and "Updated Date/Time".

Buttons:

At the bottom left, 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		Business Justification		
*End Date 01/31/2022		Attachments (0)		
*Start Date 01/30/2019				
*Status Active				
*Description Test Project ID				
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		Business Justification		
*End Date 01/31/2022		Attachments (0)		
*Start Date 01/30/2019				
*Status Active				
*Description Test Project ID				
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:

The screenshot shows a web form for a request. At the top, there's a field for '*Business Unit' with the value '01110'. Below this are two main sections: 'Core Information' and 'Business Justification'. The 'Core Information' section contains fields for '*End Date' (01/31/2022), '*Start Date' (01/30/2019), '*Status' (Active), and '*Description' (Test Project ID). The 'Business Justification' section has a link for 'Attachments (0)'. Below these are expandable sections for 'Request Comments', 'Questions', and 'Trees'. At the bottom, there's a 'Request Action' dropdown, a 'Go' button, and a 'View Approval Flow' link. A summary table shows the requester (JBECKER, John M Becker), entered by (JBECKER, John M Becker), and updated by (JBECKER, John M Becker) with their respective dates and times. At the very bottom are buttons for 'Save', 'Return to Search', and 'Notify'.

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

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

The screenshot shows a window titled 'Approval Flow'. It displays the 'Field Request Approval Stage' for 'Request ID 0000000007: Pending'. There are links for 'View/Hide Comments' and 'Start New Path'. Below this, a 'Path for Fields Approval' section shows a 'Pending' status with a clock icon, and a list of 'Multiple Approvers' including 'Chartfield FINOPS Approvers'. A 'Comments' section is also visible. At the bottom is a 'Return' button.

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
<div>Close</div>	

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 contains checkboxes for 'Control Account' and 'Statistical Account', an 'Effective Date' (01/29/2019), a 'Status' dropdown (Active), a 'Monetary Account Type' (E), a 'Unit of Measure', a '*Description' (Test Account), and a '*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' (NEXT) and a 'Help' link. Below this is a 'Details' section with a table that has columns for 'File Name', 'Show to Approver?', 'Description', 'User', 'Name', and 'Date/Time Stamp'. The table is currently empty. 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 smaller buttons labeled 'OK' and 'Cancel'.

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

The screenshot shows a 'File Attachment' dialog box. It has a 'Browse...' button which is highlighted with a red rectangle, and an 'Upload' button which is also highlighted with a red rectangle. There is a 'Cancel' button to the right of the 'Upload' button. The text 'No file selected.' is displayed in the background of the dialog box.

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 advisable 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

ChartField Requests Pending My Approval

[Refine Filter Criteria](#)

► 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		
<input type="checkbox"/>	0000000058	STATE	DEPTID	Add	1100000004	Attachments (0)	

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

Click on the Request ID link to review the request Page

General Ledger WorkCenter

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.exptestwf@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 | | 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 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 Comments

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

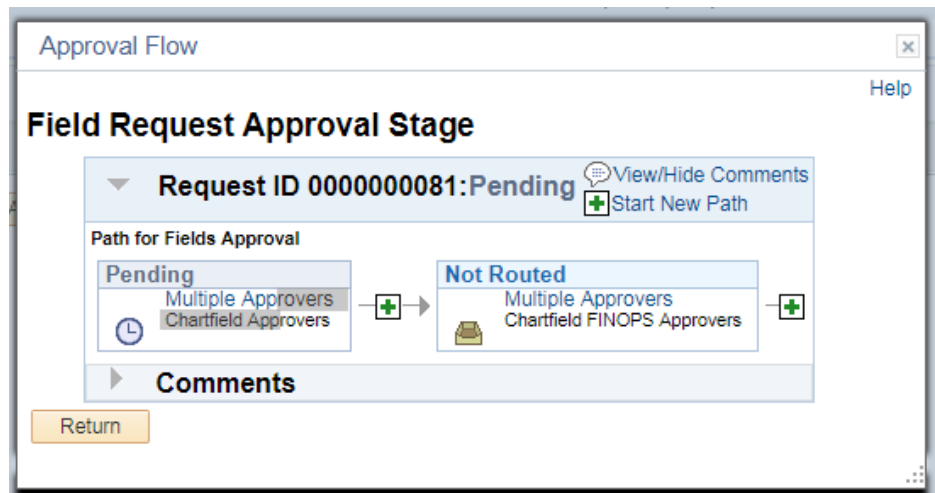
Approve

Deny

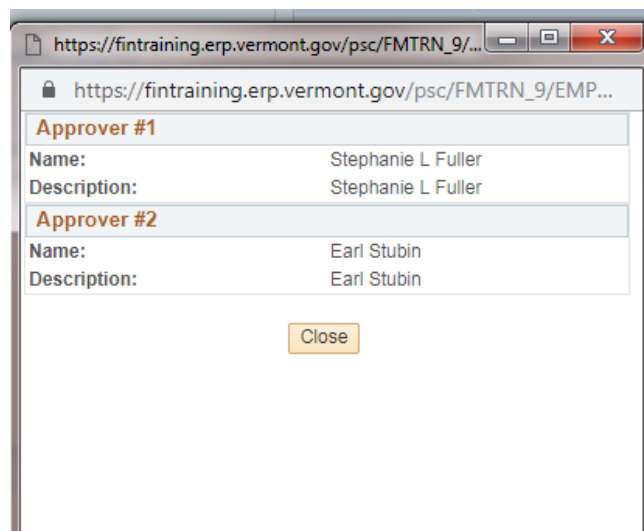
Hold

Pushback

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



Under the Pending box click the **Multiple Approvers** link to see who can approve the request at the department.



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/...

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

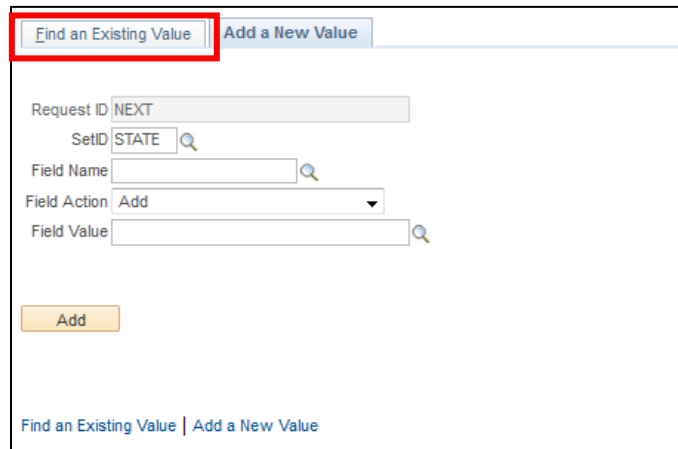
Tracking a ChartField Request Status

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:



The screenshot shows a web interface for tracking chartfield request status. At the top, there are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Below the tabs, there are several input fields: 'Request ID' with the value 'NEXT', 'SetID' with the value 'STATE' and a magnifying glass icon, 'Field Name' with a magnifying glass icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with a magnifying glass icon. Below these fields is an orange 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

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

ChartField Request

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

Request ID begins with

SetID = [Search](#)

Field Name begins with [Search](#)

Field Action =

Field Value begins with

Request Status = [Search](#)

Requester begins with [Search](#)

Entered By begins with [Search](#)

☐ Case Sensitive

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

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

Search Results

View All First 1-5 of 8 Last

Request ID	SetID	Field Name	Field Action	Field Value	Request Status	Requester	Entered By
0000000001	STATE	FUND_CODE	Add	EX033	Pending	RCAMLEY	RCAMLEY
0000000002	STATE	ACCOUNT	Add	CF40XX	Pending	DFORD	DFORD
0000000004	STATE	DEPTID	Add	CF40XXXXXX	Approved	WTUCKER	WTUCKER
0000000005	STATE	FUND_CODE	Add	XXX40	Approved	NCOLLINS	NCOLLINS
0000000006	STATE	FUND_CODE	Add	40XXX	Approved	NCOLLINS	NCOLLINS
0000000007	STATE	ACCOUNT	Add	CF40XA	Approved	ETEST	ETEST

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

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

Request ID 0000000007

Request Status Approved

Field Action Add

Telephone

*Business Unit 02100

SetID STATE [Copy](#)

Field Name ACCOUNT

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 \(1\)](#)

[Request Comments](#)

[Questions](#)

[Trees](#)

Request Action [Go](#) [View Approval Flow](#)

Requester ETEST Eric John Hoefel

Entered By ETEST Eric John Hoefel

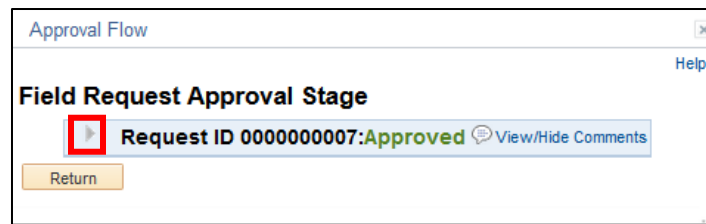
Updated By JBECKER Becker, John M

Entered Date/Time 10/30/2018 3:41PM

Updated Date/Time 10/31/2018 10:34AM

[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:



You may also click the [View/Hide Comments](#) link to read any comments:

