



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

December 2018

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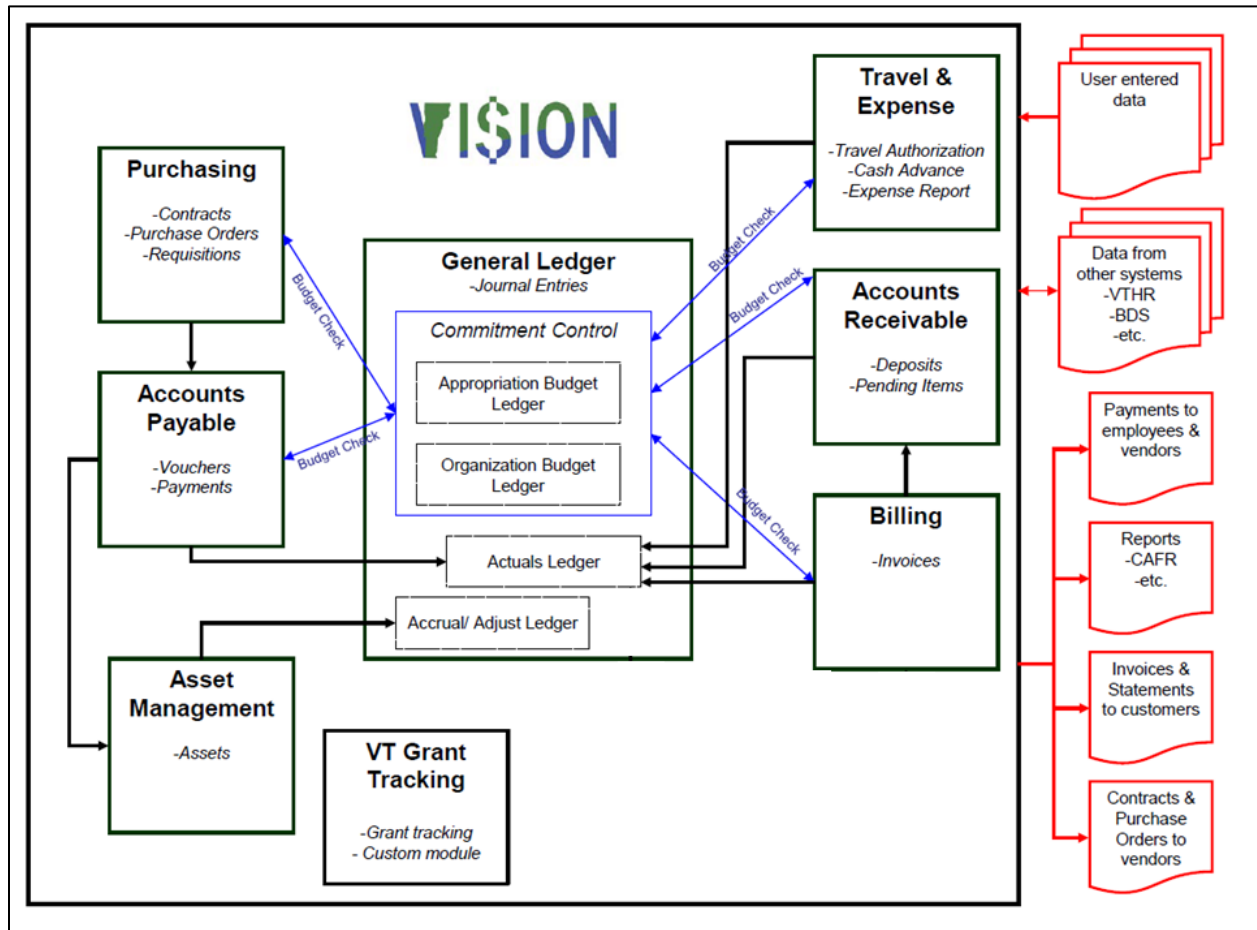
Revisions to Manual

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 9.2

VISION Financial Production login link can be found at 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 VISION.Finhelpdesk@vermont.gov to have your account unlocked.

Click on the VISION Login link:

The screenshot shows the Vermont Official State Website for the Department of Finance and Management. The header includes the Vermont logo and navigation links for SEARCH and CONTACT. The main content area features a grid of service tiles. The 'VISION Login' tile is highlighted with a red border. Other tiles include 'Employee Travel and Expenses', 'VISION Module Support', 'Forms', 'VANTAGE Login', 'State Agencies and Departments', 'Financial Transparency and Performance Accountability', 'Vendors and Grantees', 'Town Payment Reports', and 'Department News'. A sidebar on the left lists various departmental links. At the bottom, there are sections for 'Latest News' and 'Upcoming Events'.

VERMONT OFFICIAL STATE WEBSITE

AGENCY OF ADMINISTRATION

Department of Finance and Management

VISION SUPPORT BUDGET RECOMMENDATIONS FINANCIAL REPORT (CAFR) POLICIES AND PROCEDURES

Home

About the Department

State Agencies and Departments

Employee Travel and Expenses

Financial Transparency and Performance Accountability

Budget

Vendors and Grantees

Forms

VISION Module Support

Policies and Procedures

Reports and Publications

News and Events

Training and Support

VISION Financial System

VANTAGE Budget System

VISION
Login

VANTAGE
Login

Town Payment Reports
Searchable Database

Department News
Click here for the latest departmental news.

Latest News

- 21 OCTOBER 2016
New FM Website
- 28 JUNE 2016
New VSR Process

Upcoming Events

- 11 NOV 2016
Veterans' Day
- 24 NOV 2016
Thanksgiving Day
- 25 NOV 2016

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](#)

[Forgot My Password](#)

☐ Enable Accessibility Mode

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

VISION Financials Production is available daily from 6:00AM to 9:00PM.

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 in to VISION 9.2 you will use your last password from VISION 8.8 on January 31st, 2019:

Department of Finance & Management
State of Vermont

VERMONT VISION

[Back to Finance Home](#)

User ID
BSNOW

Password

[Sign In](#)

[I Forgot My Password](#)

☐ Enable Accessibility Mode

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

VISION Financials Production is available daily from 6:00AM to 9:00PM.
VISION.FINHelpdesk@vermont.gov
802-828-6700 Option 2

You will be prompted to change your password:

Department of Finance & Management
State of Vermont

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 your current VISION 8.8 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, stating: 'Message', 'Forgotten Password help is not complete, please click 'OK' to go back and set this up.', and 'OK'.

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.

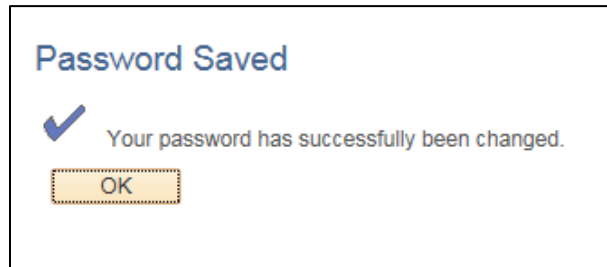
5. Click on the **Change or set up forgotten password help** link:

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 > **Navigator** > **My System Profile**

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

The screenshot shows the 'General Profile Information' page for Roger Allen Smith. The 'Change or set up forgotten password help' link is highlighted with a red box. Below it, the 'Personalizations' section shows language and currency settings. The 'Alternate User' section has a red box around the 'Alternate User ID' field. The 'Workflow Attributes' section shows checkboxes for 'Email User' and 'Worklist User'. The 'Miscellaneous User Links' section shows a table with columns for 'Email', 'Personalize', 'Find', and 'First'. The 'IM Information' section shows a table with columns for 'Protocol', 'XMPP Domain', 'UserID', and 'Password'.

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 highlighted with a blue background. The other questions are: '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?', and '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**:

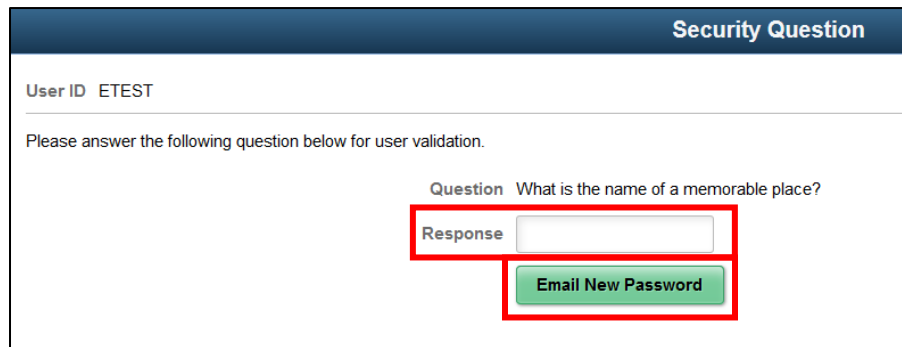
Forgotten Password

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:

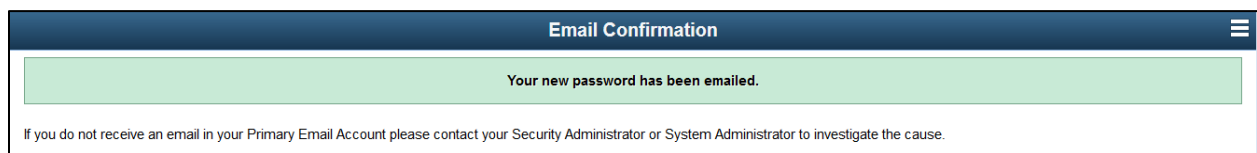
Continue

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



The form is titled "Security Question" in a dark blue header. Below the header, it displays "User ID ETEST". A message states: "Please answer the following question below for user validation." The question is "Question What is the name of a memorable place?". There is a text input field labeled "Response" and a green button labeled "Email New Password". Both the input field and the button are highlighted with a red rectangular border.

You'll receive the following message:



The message is titled "Email Confirmation" in a dark blue header. The main content area has a light green background and contains the text "Your new password has been emailed." Below this, in a smaller font, it says "If you do not receive an email in your Primary Email Account please contact your Security Administrator or System Administrator to investigate the cause." A hamburger menu icon is visible in the top right corner of the header.

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 > **Navigator** 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: English
and email is: English
Currency Code:
Default Mobile Page:

Alternate User

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

Alternate User ID:
From Date: (example 12/31/2000)
To Date: (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.expstestw@vermont.gov	+

IM Information

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

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

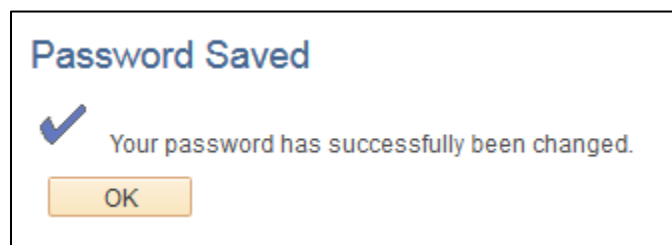
*Current Password

*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**

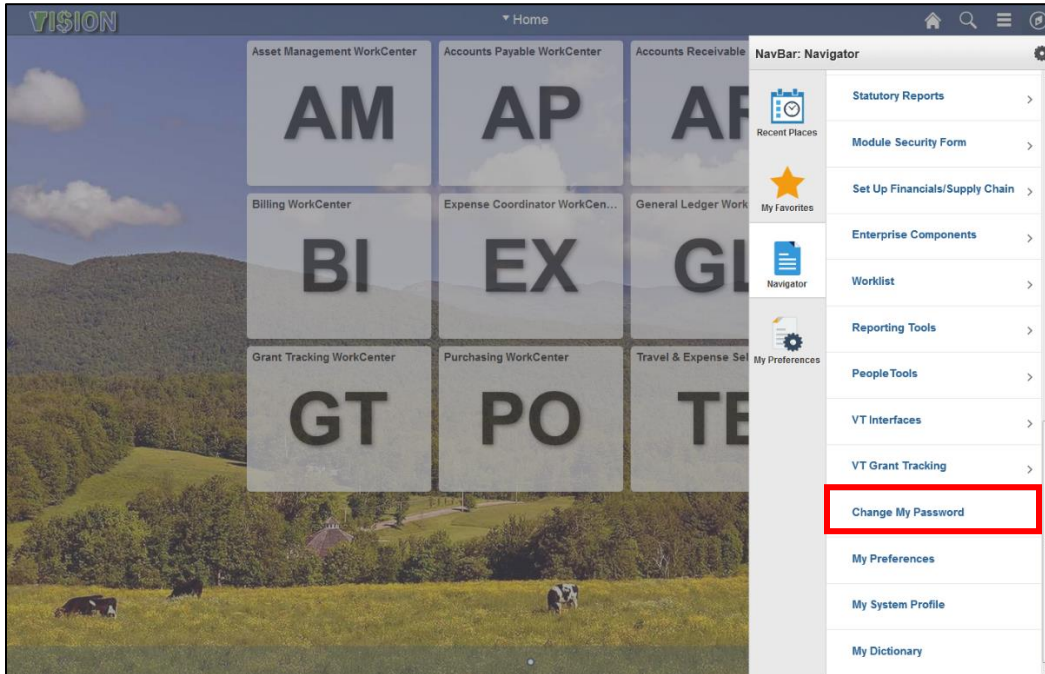


What to do if you are having difficulty logging in:

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.finhelppdesk@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 [Navigator Menu](#):



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

Change Password

User ID JSMITH
 John Smith

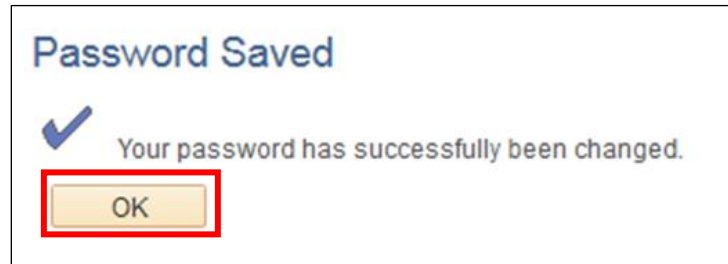
*Current Password

*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

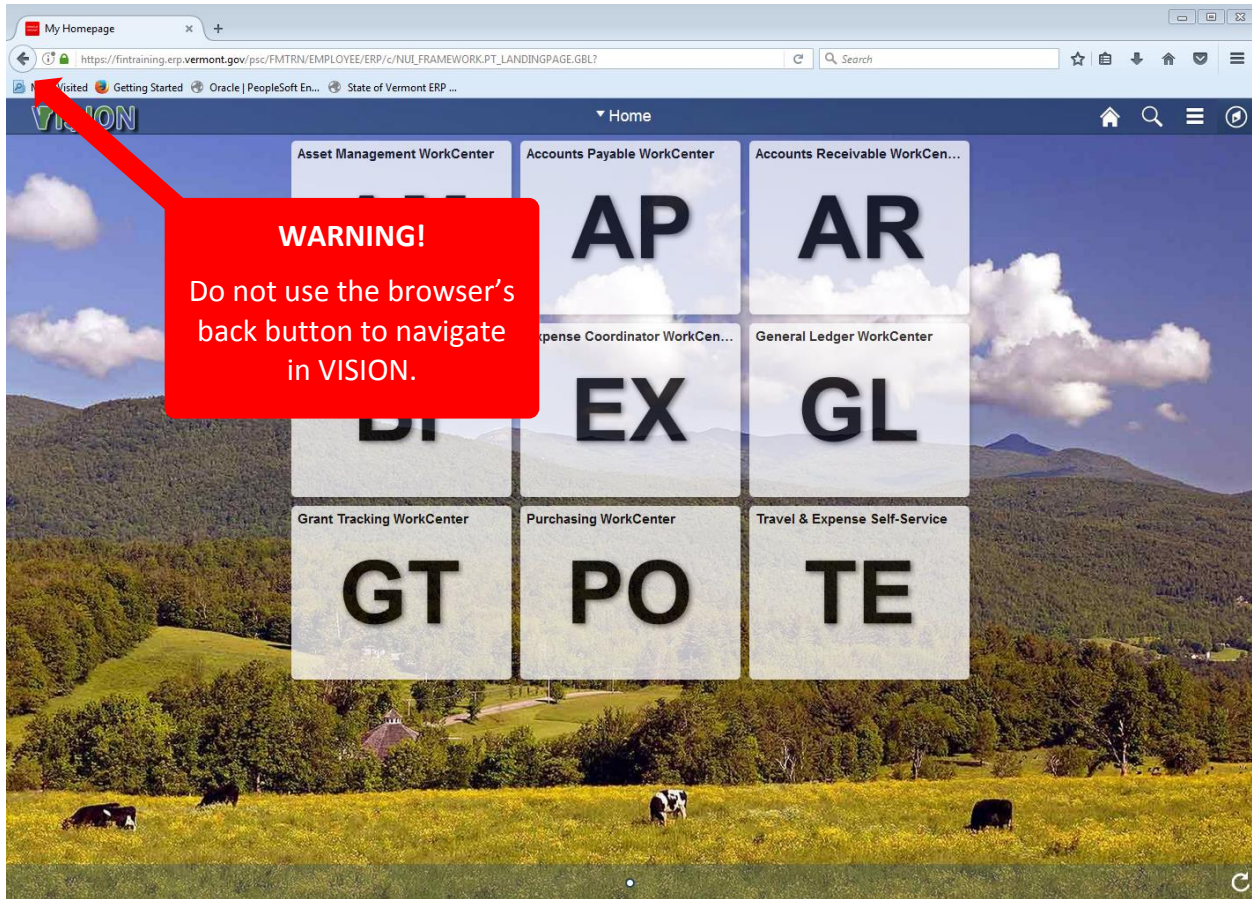


5. Click **OK**

System Navigation

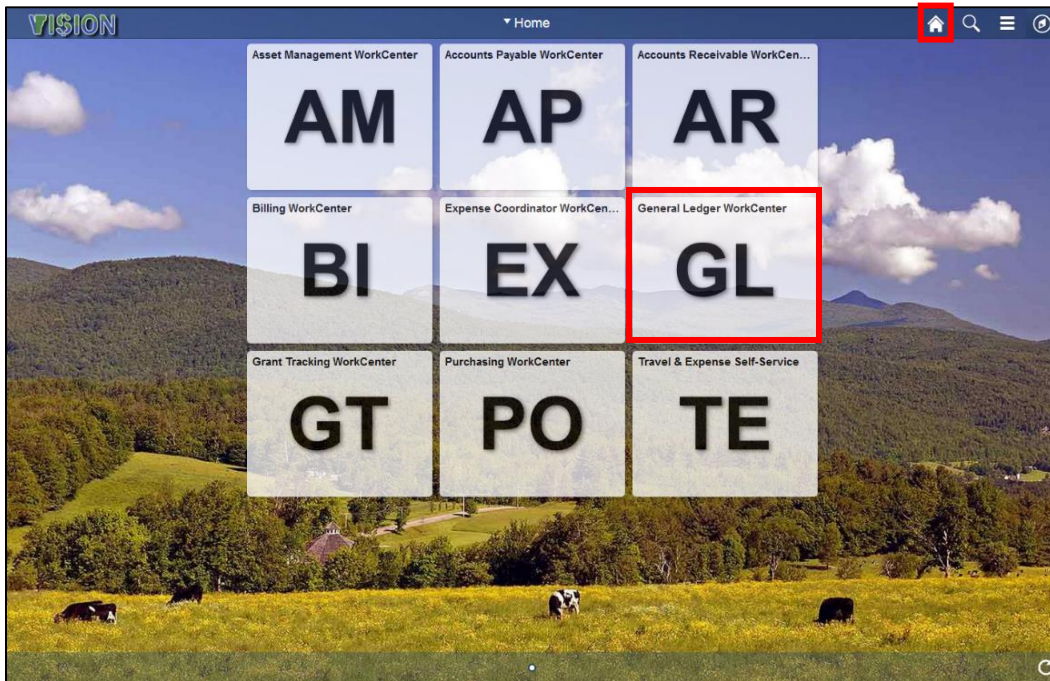
VISION Version 9.2 is a web-based application that uses many standard web browser features such as menus, drop down selection lists, icons, links, etc. The menu options you see will differ based on the security access appropriate for your job functions.

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.

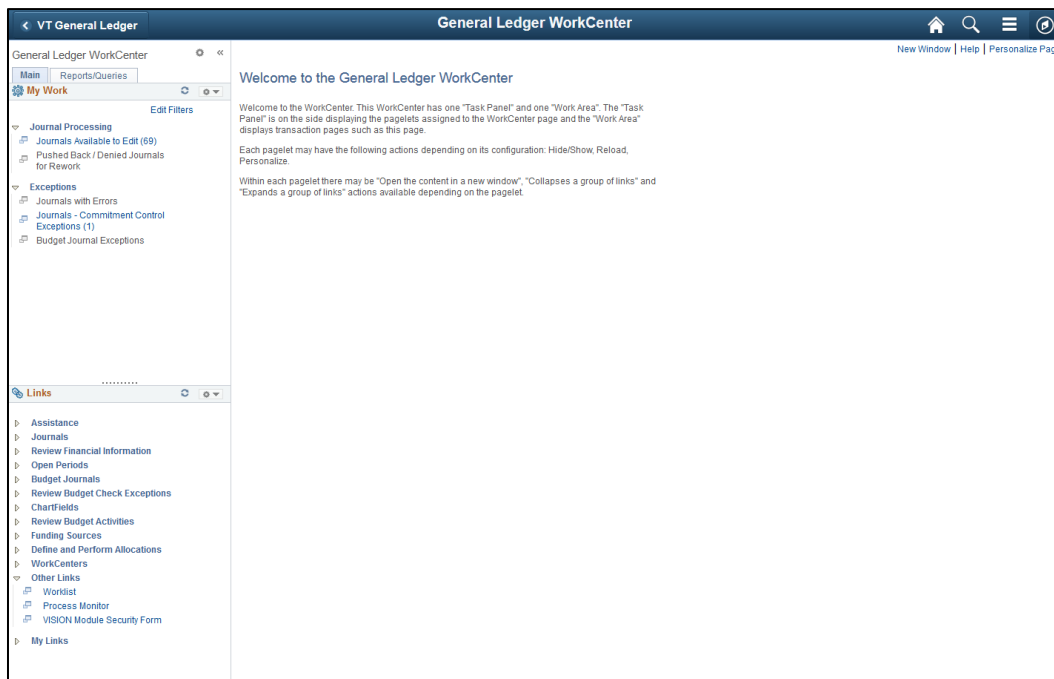


Using Tiles

When you first sign in to 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:

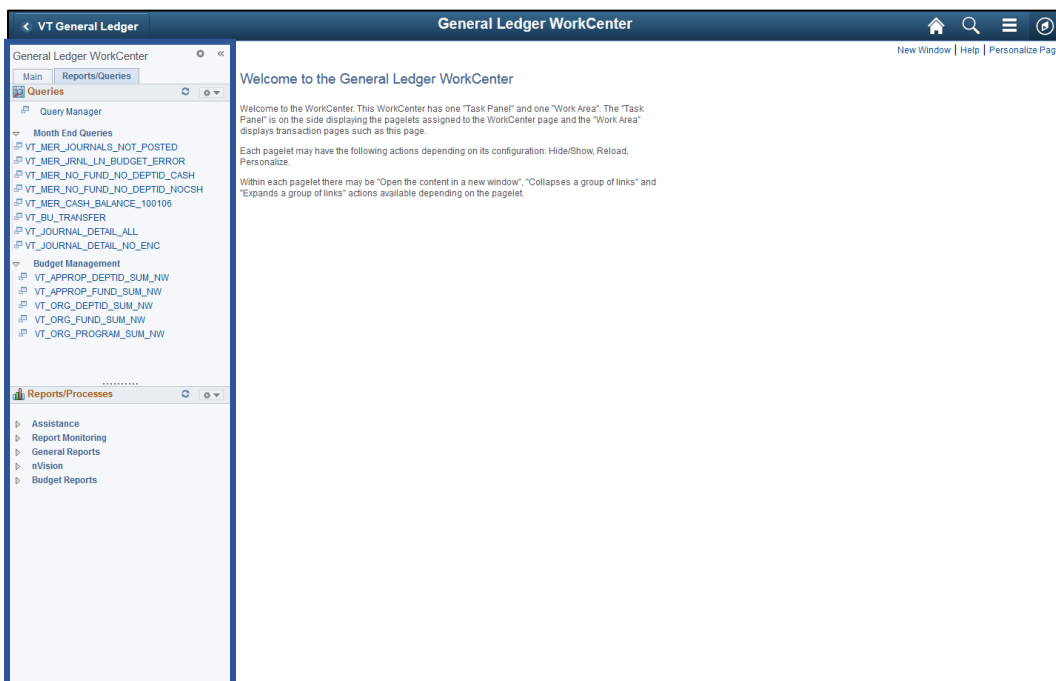
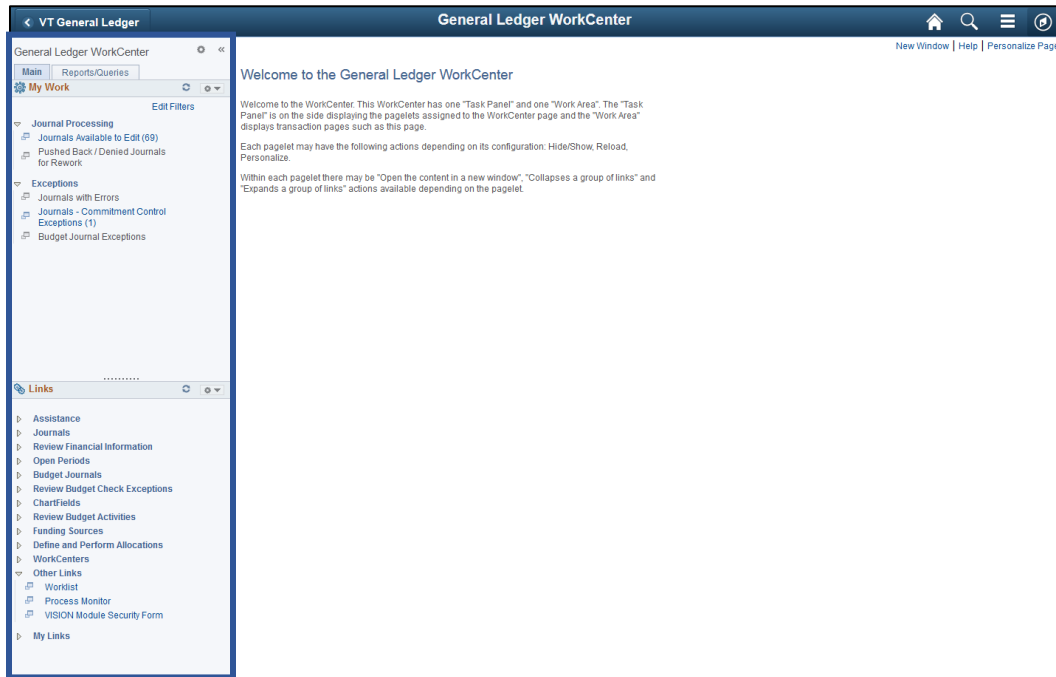


Clicking on a tile will take you to the associated module WorkCenter or page:



WorkCenters

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



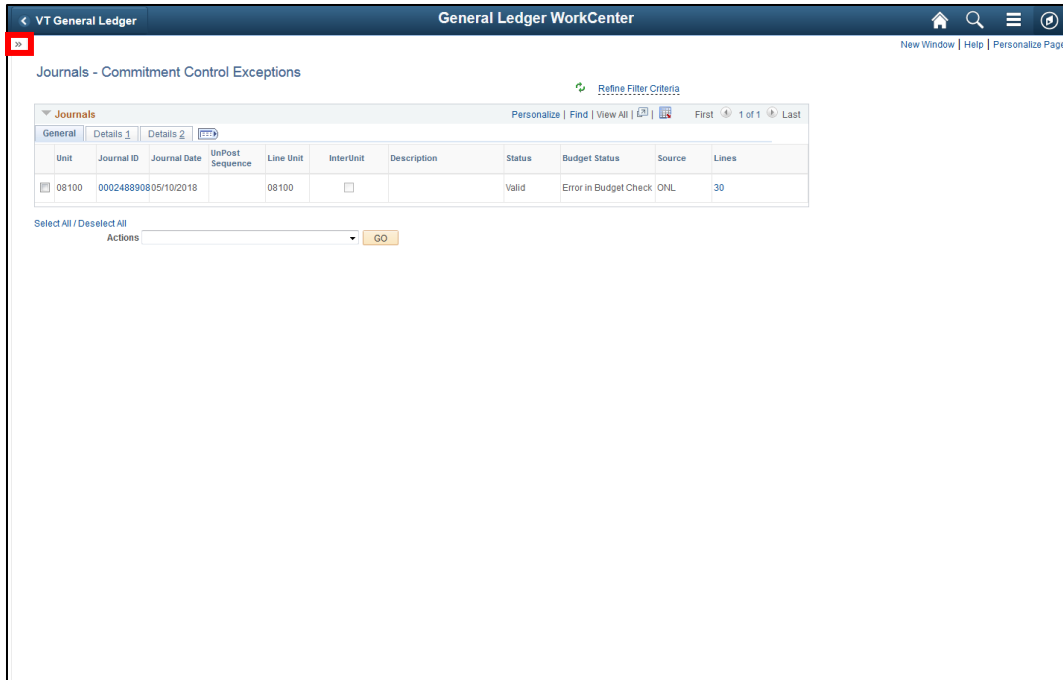
Links in the My Work pagelet will be blue and have an item count when there are items that require your attention. Clicking on an active link will open a list of work:

The screenshot shows the 'General Ledger WorkCenter' interface. On the left, under the 'My Work' section, there is a list of links. The link 'Journals - Commitment Control Exceptions (1)' is highlighted with a red box and a red arrow pointing to the main content area. The main content area displays the 'Journals - Commitment Control Exceptions' pagelet, which includes a table with the following data:

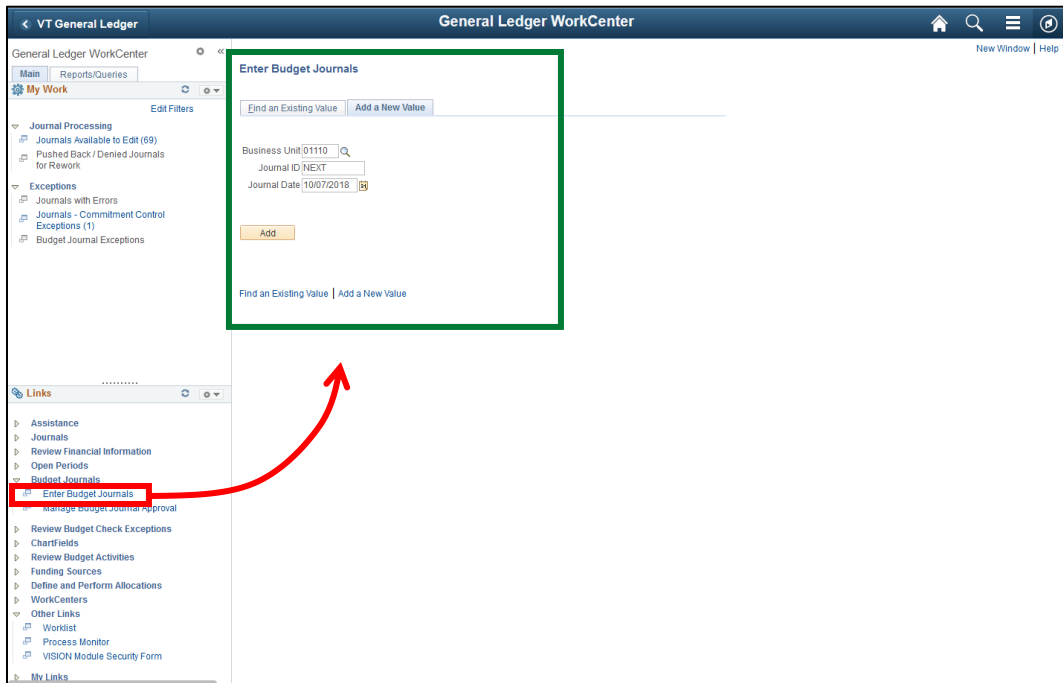
Unit	Journal ID	Journal Date	UnPost Sequence	Line Unit	InterUnit	Description	Status	Budget Status	Source	Lines
08100	0002488908	05/10/2018		08100			Valid	Error in Budget Check	ONIL	30

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

The screenshot shows the 'General Ledger WorkCenter' interface. In the top right corner of the pagelet header, there is a red box highlighting the 'Double Arrow' icon. This icon is used to minimize or expand the pagelet window.



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



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

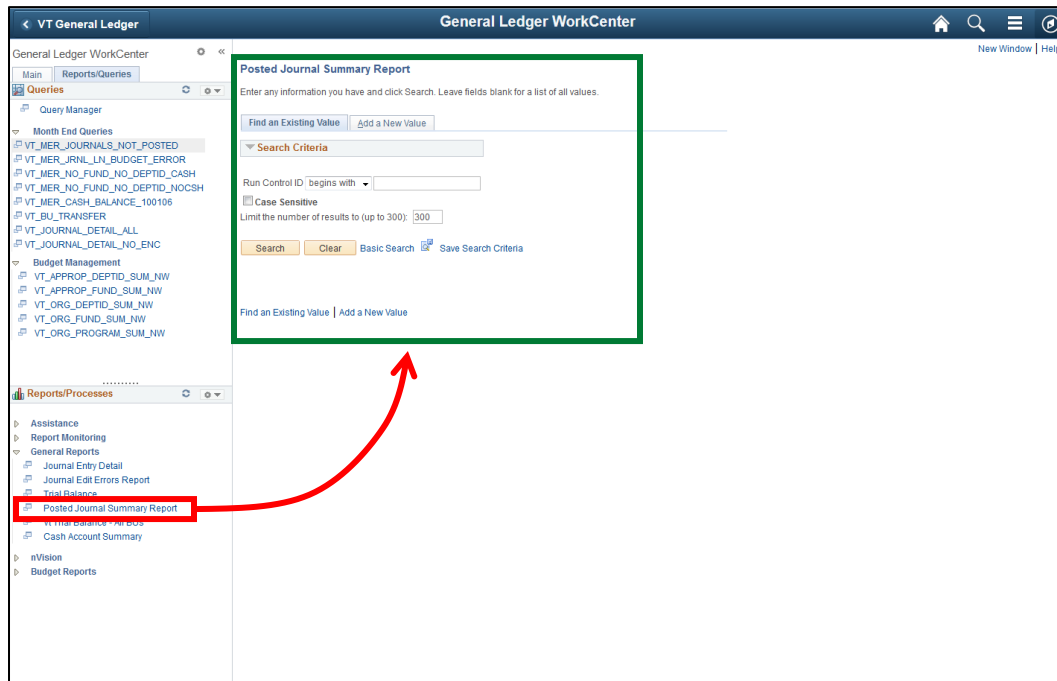
The screenshot shows the 'General Ledger WorkCenter' interface. On the left, under 'Month End Queries', the query 'VT_MER_JOURNALS_NOT_POSTED' is highlighted with a red box and an arrow. The main area displays the query title 'VT_MER_JOURNALS_NOT_POSTED - Month End Rpt/JE's not posted'. Below the title, there are fields for 'Through Date' (set to 10/07/2018) and 'GL Business Unit' (set to 08100). A 'View Results' button is visible. Below these fields is a table with the following columns: GL Business Unit, Ledger Group, Journal ID, Seq, Journal Date, Journal Class, Source, Journal Header Status, Budget Check Status, User, Long Descr, Total Debits, Total Credits, Year, and Period.

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

The screenshot shows the 'General Ledger WorkCenter' interface with the query results displayed. The 'Excel Spreadsheet' link is highlighted in the download options. The table displays 9 rows of data with the following columns: GL Business Unit, Ledger Group, Journal ID, Seq, Journal Date, Journal Class, Source, Journal Header Status, Budget Check Status, User, Long Descr, Total Debits, Total Credits, Year, and Period.

GL Business Unit	Ledger Group	Journal ID	Seq	Journal Date	Journal Class	Source	Journal Header Status	Budget Check Status	User	Long Descr	Total Debits	Total Credits	Year	Period
08100	ACTUALS	0002471529	0	05/01/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	JSHELTRA	AOT receiving reimb from Dept. of Public Safety for MOU for creation of the Statewide Property Parcel Mapping - SPPM Internal-\$605.99 SPPM Vendors-\$6737.80 (Copied by Finops-Orig entered by DLUCE dated 4/4/18)	7343.790	7343.790	2018	11	
08100	ACTUALS	0002484467	0	05/02/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	CURIE	AOT receiving reimbursement for Capital Computers Program. ROE per 19 VSA 11e. CURIE	160.000	160.000	2018	11	
08100	ACTUALS	0002488908	0	05/10/2018	ONL	Valid Journal - Edits Complete	Error in Budget Check	VP1		265743.440	265743.440	2018	11	
08100	ACTUALS	0002490053	0	05/15/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	DUTTON	32806- REFA-MACARTHER-DEBIT MEMO TO CORRECT ENTRY- 2488267-05/03/2018-DU	76.000	76.000	2018	11	
08100	ACTUALS	0002490047	0	05/15/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	DUTTON	32809 REFA-MEDITERRANEAN MIX-(EURO RESTAURANT)-DEBIT MEMO TO CORRECT ENTRY- 2488269-05/03/2018-DU	16.000	16.000	2018	11	
08100	ACTUALS	0002490048	0	05/15/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	DUTTON	32806 REFA-SANTIAGO-DEBIT MEMO TO CORRECT ENTRY- 2488265-05/03/2018-DU	51.000	51.000	2018	11	
08100	ACTUALS	0002490107	0	05/15/2018	ONL	Valid Journal - Edits Complete	Not Budget Checked	CURIE	To correct direct journal 8100H44308 dated 4/30/18. Correcting program in vision. CURIE	619309.180	619309.180	2018	11	
08100	ACTUALS	0002490099	0	05/15/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	DLUCE	AOT is paying VT Court Administrators Office for MU0183 RPT06 March for \$ 9,756.36 -DML	9756.360	9756.360	2018	11	
08100	ACTUALS	0002490106	0	05/15/2018	TSF	Valid Journal - Edits Complete	Not Budget Checked	DLUCE	AOT is paying ANR for Permit 7394-0015A for 680.00 -DML	680.000	680.000	2018	11	

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 > **Navigator** icon > **Worklist**:

1 Click **Mark Worked** to remove notifications from your Worklist

2 Click the link to act on an approval request, any action removes the item from your Worklist.

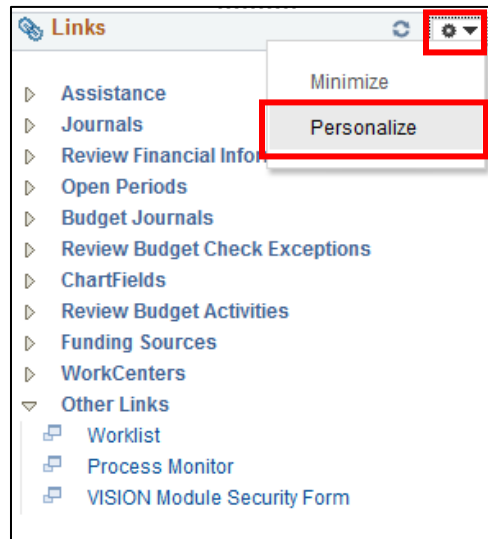
From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Joanne Chadwick	09/27/2018	Transaction Approved	Approval Workflow	3-Low	Credit Invoice, 145, VTCredit Invoice Approval, 2018-01-11, N.O. BUSINESS UNIT 02140 INVOICE 75843 RDC A.O.R.	Mark Worked	Reassign
Joanne Chadwick	09/27/2018	Transaction Approved	Approval Workflow	3-Low	Credit Invoice, 141, VTCredit Invoice Approval, 2018-01-11, N.O. BUSINESS UNIT 02140 INVOICE 75844 RDC A.O.R.	Mark Worked	Reassign
Joanne Chadwick	09/27/2018	Transaction Approved	Approval Workflow	3-Low	Credit Invoice, 142, VTCredit Invoice Approval, 2018-01-11, N.O. BUSINESS UNIT 02140 INVOICE 75845 RDC A.O.R.	Mark Worked	Reassign
Joanne Chadwick	09/27/2018	Transaction Approved	Approval Workflow	3-Low	Credit Invoice, 143, VTCredit Invoice Approval, 2018-01-11, N.O. BUSINESS UNIT 02140 INVOICE 75846 RDC A.O.R.	Mark Worked	Reassign
Joanne Chadwick	09/27/2018	Transaction Approved	Approval Workflow	3-Low	Credit Invoice, 144, VTCredit Invoice Approval, 2018-01-11, N.O. BUSINESS UNIT 02140 INVOICE 75847 RDC A.O.R.	Mark Worked	Reassign
Hallenbeck, Richard M	08/31/2018	Approval Routing	Approval Workflow	1-High	GL Journal Approval, 51, VTCredit Invoice Approval, 1901-01-14, N.O. BUSINESS UNIT 02140 JOURNAL ID:0002491140 JOURNAL DATE:2018-08-31 BUSINESS UNIT LN02140 SOCRAVA	Mark Worked	Reassign

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**:



This opens the Define User "Links" Links box:

A screenshot of the 'Define User "Links" Links' box. The box is titled 'Links Pagelet Personalization' and shows 'Configuration ID GL' and 'User ID ETEST'. There is a 'Link Groups' section with a search bar, 'Find | View All', and 'First 1 of 1 Last'. A red callout box with the text 'Click the + icon to add a new Link Group.' points to a '+' icon in the bottom right corner of the 'Link Groups' section. Below this is a 'Link List' section with a table. The table has columns: Define Link, Display Order, Link Label, Link Type, Show Link, Starting Page, and Open in New Window. The first row shows 'Define', '10', 'General Ledger Module Support', 'URL', a checked 'Show Link' box, an unchecked 'Starting Page' box, and a checked 'Open in New Window' box. A 'Save' button is at the bottom left.

Define User "Links" Links

Links Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID ETEST

Link Groups ? Find | View All First 2 of 12 Last

*Group Label My Links

Display Order 13

☐ Start Group Collapsed

Link Order Link Label

Define

Save

2 Click Define

1 Enter a group label and the order you want this group displayed in. In this case your new links group will appear at the end of the list.

Define Link

*Link Type URL

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

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

Label Chartfields & Accounting Periods

OK

2 Click OK

1 Select **URL** from the Link Type drop down menu, paste the desired URL into the **URLID** box, and enter a label that will appear in the pagelet.

Define User "Links" Links

Links Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID ETEST

Link Groups ?

*Group Label My Links

Display Order 13

☒ Start Group Collapsed

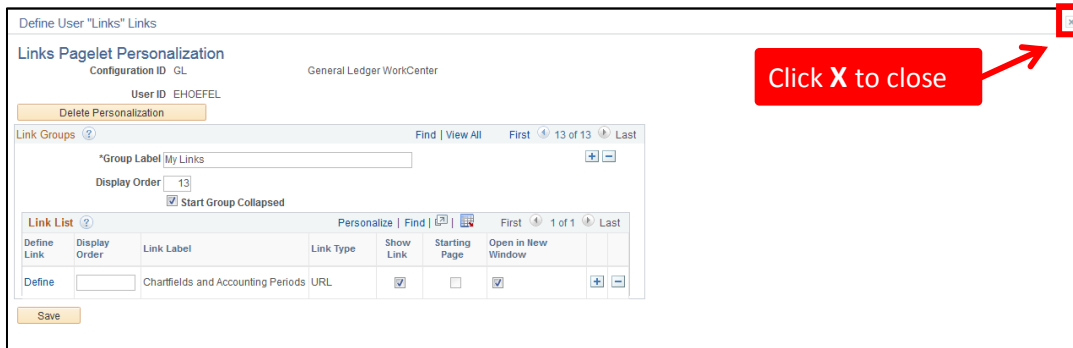
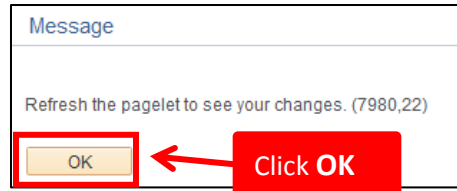
Link List ? Personalize | Find | 1 of 1 Last

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

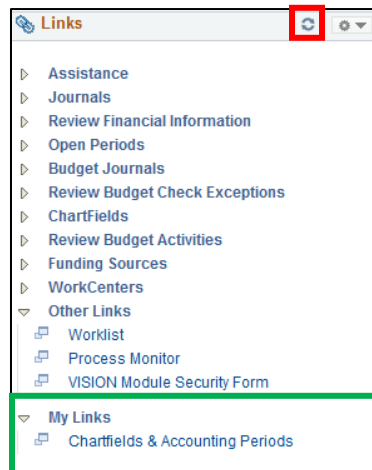
Save

2 Click Save

1 Select **Start Group Collapsed** to show only the group title in the pagelet. Select **Open in New Window** to open the link in a new browser window (recommended for non-PeopleSoft pages.)

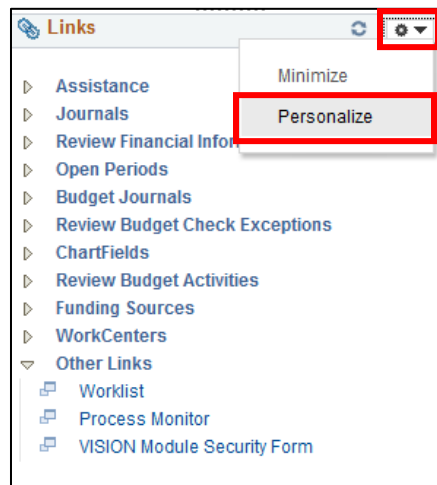


Click the **Refresh Pagelet** icon, you have added a link to web content:



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 box:

A screenshot of the 'Define User "Links" Links' box. The box is titled 'Links Pagelet Personalization' and shows the configuration for a user named 'ETEST'. The 'Link Groups' section has a table with one group labeled 'Assistance' and a display order of 1. The 'Link List' section has a table with one link labeled 'General Ledger Module Support'. A red callout box with a '+' icon and the text 'Click the + icon to add a new Link Group.' points to the '+' icon in the 'Link Groups' table.

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"/>

A screenshot of the 'Define User "Links" Links' box with annotations. The box is titled 'Links Pagelet Personalization' and shows the configuration for a user named 'ETEST'. The 'Link Groups' section has a table with one group labeled 'My Links' and a display order of 13. The 'Link List' section has a table with one link labeled 'General Ledger Module Support'. A red callout box with the number '2' and the text 'Click Define' points to the 'Define' button in the 'Link List' section. Another red callout box with the number '1' and the text 'Enter a group label and the order you want this group displayed in. In this case your new links group will appear at the end of the list.' points to the 'Group Label' and 'Display Order' fields in the 'Link Groups' table.

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define	13	General Ledger Module Support	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

If you have already created a My Links group, you can add a new link to the existing group:

Define User "Links" Links

Links Pagelet Personalization

Configuration ID GL

User ID ETEST

Delete Personalization

Link Groups ? Find | View All First 12 of 12 **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		Chartfields & Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+

Save

1 Go to the My Links group by clicking on **Last**.

2 Click the + icon to add a new Link.

Define User "Links" Links

Links Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID ETEST

Delete Personalization

Link Groups ? Find | View All First 12 of 12 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		Chartfields & Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+
Define			Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+

Save

Click Define

Define Link

*Link Type Menu Item **Select Menu Item**

Menu Item Name

☐ Override Label

Label

OK Cancel

Click Select Menu Item

Scroll to the module and page you want to add:

Select a Content Reference

Drag to move

Click a content reference link to pick a content reference
Select Cancel to return back to the previous page

☐ Include hidden Crefs

Left | Right

- Root
 - Employee Self-Service
 - Manager Self-Service
 - Supplier Contracts
 - Customers
 - Items
 - Cost Accounting
 - Suppliers
 - Procurement Contracts
 - Purchasing
 - Inventory
 - Travel and Expenses
 - Billing
 - Accounts Receivable
 - Accounts Payable
 - Vouchers
 - Batch Processes
 - Review Accounts Payable Info
 - [Accounting Entries]**
 - [Document Status]
 - [Journal Drill Down]
 - [Match Workbench]
 - [Unbalanced Accounting Entries]
 - [Voucher]

Click on the page you want to link to

Define Link

*Link Type: [Select Menu Item](#)

Menu Item Name: EP_VCHR_ACCTG_ENTRIES_GBL

☐ Override Label

Label: Accounting Entries

OK Cancel

Click OK

You can change the label by clicking **Override Label** and entering a new label name.

Define User "Links" Links

Links Pagelet Personalization

Configuration ID: GL General Ledger WorkCenter

User ID: ETEST

[Delete Personalization](#)

Link Groups [Find](#) | [View All](#) First 12 of 12 Last

*Group Label: My Links

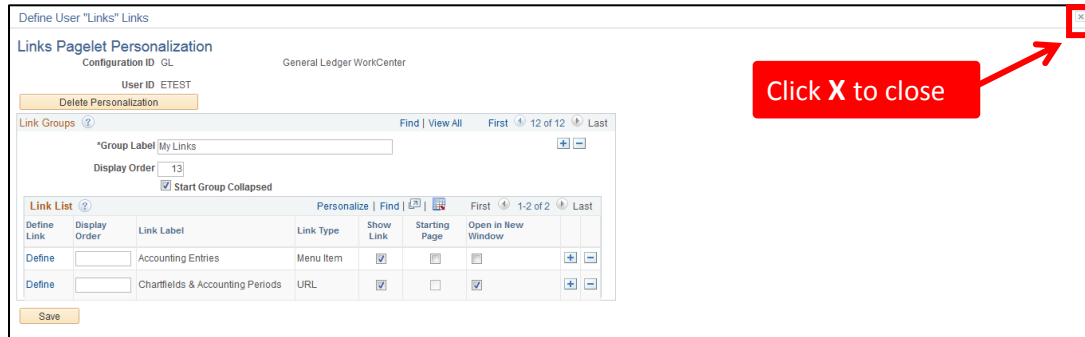
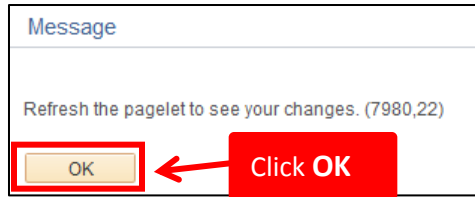
Display Order: 13

☒ Start Group Collapsed

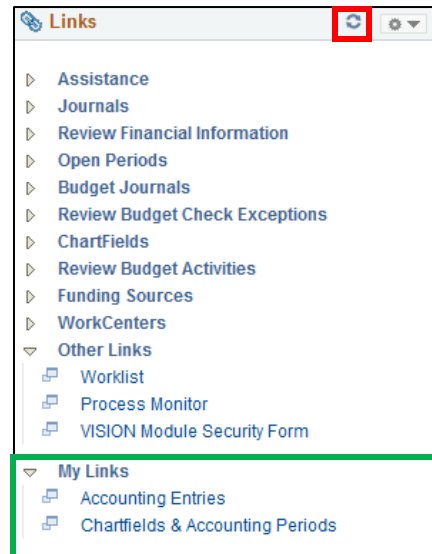
Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define		Accounting Entries	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define		Accounting Periods	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>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

Click Save

Save

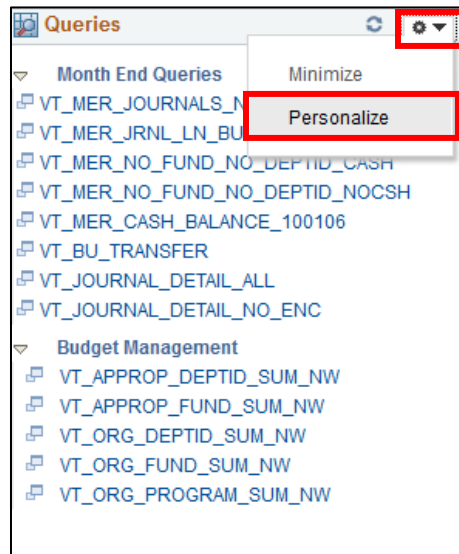


Click the **Refresh Pagelet** icon, you have added a link to a PeopleSoft page:



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 box:

Define User Query Links

Queries Pagelet Personalization

Configuration ID: GL General L

User ID: ETEST

Query Groups ?

*Group Label: Month End Queries

Display Order: 1

☐ Start Group Collapsed

Query Definition ?

Personalize | Find | View All | First | 1 of 2 | Last

Click the + icon to add a new Query Group.

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"/>	
20	Public Owner	Query	VT_MER_JRNL_LN_BUDGET_ERROR	VT_MER_JRNL_LN_BUDGET_ERROR	<input checked="" type="checkbox"/>	
30	Public Owner	Query	VT_MER_NO_FUND_NO_DEPTID_CASH	VT_MER_NO_FUND_NO_DEPTID_CASH	<input checked="" type="checkbox"/>	
40	Public Owner	Query	VT_MER_NO_FUND_NO_DEPTID_NOCASH	VT_MER_NO_FUND_NO_DEPTID_NOCASH	<input checked="" type="checkbox"/>	
50	Public Owner	Query	VT_MER_CASH_BALANCE_100106	VT_MER_CASH_BALANCE_100106	<input checked="" type="checkbox"/>	
60	Public Owner	Query	VT_BU_TRANSFER	VT_BU_TRANSFER	<input checked="" type="checkbox"/>	
70	Public Owner	Query	VT_JOURNAL_DETAIL_ALL	VT_JOURNAL_DETAIL_ALL	<input checked="" type="checkbox"/>	
80	Public Owner	Query	VT_JOURNAL_DETAIL_NO_ENC	VT_JOURNAL_DETAIL_NO_ENC	<input checked="" type="checkbox"/>	

Save

Define User Query Links

Queries Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID ETEST

Query Groups ?

*Group Label My Queries

Display Order 3

☒ Start Group Collapsed

Query Definition ?

Display Order	Owner	*Type	Override Title/Description	Query Name	Description	Personalize	Find	Show Link	Starting Page
	Public Owner	Query							

Save

1 Enter a group label and the order you want this group displayed in. In this case your new query group will appear at the end of the list.

2 Click the Look Up icon

Look Up Query Name

Search by: Query Name begins with VT_MER

Look Up Cancel Advanced Lookup

Search Results

Only the first 300 results of a possible 3,001 can be displayed

View 100 First

Query Name	Description
1099C_CUST_DATA	Input to 1099C
ADB_LEDGER	Ledger ADB D
ADB_MTD	Month to date averages

Enter "VT_MER" in the Search by box and click Look Up to get a list of public queries.

Look Up Query Name

Search by: Query Name begins with VT_MER

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-33 of 33 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_BALANCE_100106	returns 100106 bal for a BU
VT_MER_DEPOSITS_NOT_POSTED	Dep. not Dir Jrls & not posted
VT_MER_DJ_NOT_POSTED_TO_GL	Mnth End Rpt/Reqs not posted
VT_MER_EXP_RPT_NOT_JG	Exp Rpt not JG
VT_MER_EXP_RPT_NOT_POSTED	Expenses not posted
VT_MER_GROUPS_NOT_POSTED	Pending Groups not posted
VT_MER_GROUPS_POSTED_NOT_JG	Groups posted not JG
VT_MER_JOURNALS_NOT_POSTED	Month End Journals not posted
VT_MER_JRNL_LN_BUDGET_ERROR	Journal Line Budget Error
VT_MER_NO_FUND_NO_DEPTID_CASH	acct bal for no fund no deptid
VT_MER_NO_FUND_NO_DEPTID_NOCASH	acct bal for no fund no deptid
VT_MER_OPEN_AP	Open AP
VT_MER_OPEN_CASH_ADVANCE	Open Cash Advance Balances
VT_MER_PO_NOT_FINISHED	Mnth End Rpt/Reqs 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	Reqs not at Complete status
VT_MER_TAUTH_NOT_APPROVED	TA's not approved
VT_MER_VCHRS_NOT_POSTED	AP Vouchers not posted
VT_MER_VCHR_POSTED_NOT_JG	Posted vchrs not jrn generate
VT_MER_WORKSHEETS_NOT_POSTED	Open MT Worksheet Items

Click on the Query Name you want to link to.

Define User Query Links

Queries Pagelet Personalization
Configuration ID: GL General Ledger WorkCenter
User ID: ETEST

[Delete Personalization](#)

Query Groups ? Find | View All First 2 of 4 Last

*Group Label: My Queries
Display Order: 3
☐ Start Group Collapsed

Query Definition ? Personalize | Find | Show Link Starting Page First 1 of 1 Last

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

[Save](#) **Click Save**

Message

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

[OK](#) **Click OK**

Define User Query Links

Queries Pagelet Personalization
Configuration ID: GL General Ledger WorkCenter
User ID: ETEST

[Delete Personalization](#)

Query Groups ? Find | View All First 2 of 4 Last

*Group Label: My Queries
Display Order: 3
☐ Start Group Collapsed



Query Definition ? Personalize | Find | Show Link Starting Page First 1 of 1 Last

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

[Save](#)

Click X to close

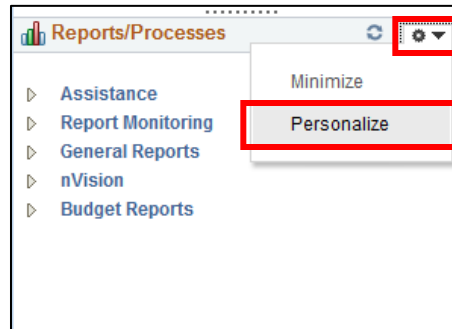
Click the **Refresh Pagelet** icon, you have added a query:

Queries  

- 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 box:

A screenshot of the 'Define User "Reports" Links' dialog box. The title is 'Reports/Processes Pagelet Personalization'. It shows 'Configuration ID: GL' and 'General Ledger'. The 'User ID' is 'ETEST'. There is a 'Link Groups' section with a text input for '*Group Label' containing 'Assistance' and a 'Display Order' of '1'. A checkbox 'Start Group Collapsed' is checked. Below is a 'Link List' table with one row: 'Define' link, 'Report/Query Assistance' label, 'URL' type, and 'Report/Query Assistance' ID. The 'Show Link' checkbox is checked, 'Starting Page' is unchecked, and 'Open in New Window' is checked. A red callout box with a '+' icon points to the 'Find | View All' area, with the text 'Click the + icon to add a new Query Group.' A 'Save' button is at the bottom.

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window
Define		Report/Query Assistance	URL		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

A screenshot of the 'Define User "Reports" Links' dialog box with annotations. A red circle '1' points to the '*Group Label' input field, which now contains 'My Reports'. The 'Display Order' is '6'. A red callout box says 'Enter a group label and the order you want this group displayed in. In this case your new reports/processes group will appear at the end of the list.' Another red circle '2' points to the 'Define' button in the 'Link List' table. A red callout box says 'Click Define'. The 'Link List' table has one row: 'Define' link, 'Display Order' 6, 'Link Label' is empty, 'Link Type' is 'Menu Item', and 'Run Control ID' is empty. The 'Show Link' checkbox is checked, 'Starting Page' is unchecked, and 'Open in New Window' is checked. A 'Save' button is at the bottom.

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window
Define	6		Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Define Link

*Link Type Menu Item Select Menu Item

Menu Item Name

☐ Override Label

Label

OK Cancel

Click **Select Menu Item**

Select a Content Reference

Click a content reference link to pick a content reference
Select Cancel to return back to the previous page

☐ Include hidden Crefs

Left | Right

- Root
 - Employee Self-Service
 - Manager Self-Service
 - Supplier Contracts
 - Customers
 - Items
 - Cost Accounting
 - Suppliers
 - Procurement Contracts
 - Purchasing
 - Inventory
 - Travel and Expenses
 - Billing
 - Accounts Receivable
 - Accounts Payable
 - Vouchers
 - Batch Processes
 - Review Accounts Payable Info
 - Reports
 - Vouchers
 - Voucher Reconciliation
 - Payments
 - Supplier
 - [Payment History by Supplier]**
 - [Supplier Balance]
 - [Supplier Detail]
 - [Supplier Summary]
 - [Accounts Payable WorkCenter]

Click on the report you want to link to

Define Link

*Link Type Menu Item [Select Menu Item](#)

Menu Item Name EP_RUN_APY2000_GBL

☐ **Override Label**

Label Payment History by Supplier

Click OK

OK **Cancel**

You can change the label by clicking **Override Label** and entering a new label name.

Define User "Reports" Links

Reports/Processes Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID ETEST

Link Groups [Find](#) [View All](#) [First](#) [2 of 6](#) [Last](#)

*Group Label My Reports [+](#) [-](#)

Display Order 6

☐ Start Group Collapsed

Link List [Personalize](#) [Find](#) [1 of 1](#) [Last](#)

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

Click Save

Save

Message

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

Click OK

OK

Define User "Reports" Links

Reports/Processes Pagelet Personalization

Configuration ID GL General Ledger WorkCenter

User ID ETEST

[Delete Personalization](#)

Link Groups [Find](#) [View All](#) [First](#) [2 of 6](#) [Last](#)

*Group Label Report Monitoring [+](#)

Display Order 2

☒ Start Group Collapsed

Link List [Personalize](#) [Find](#) [1-3 of 3](#) [Last](#)

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window
Define	10	Process Monitor	Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	20	Report Manager	Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	30	Query Viewer	Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

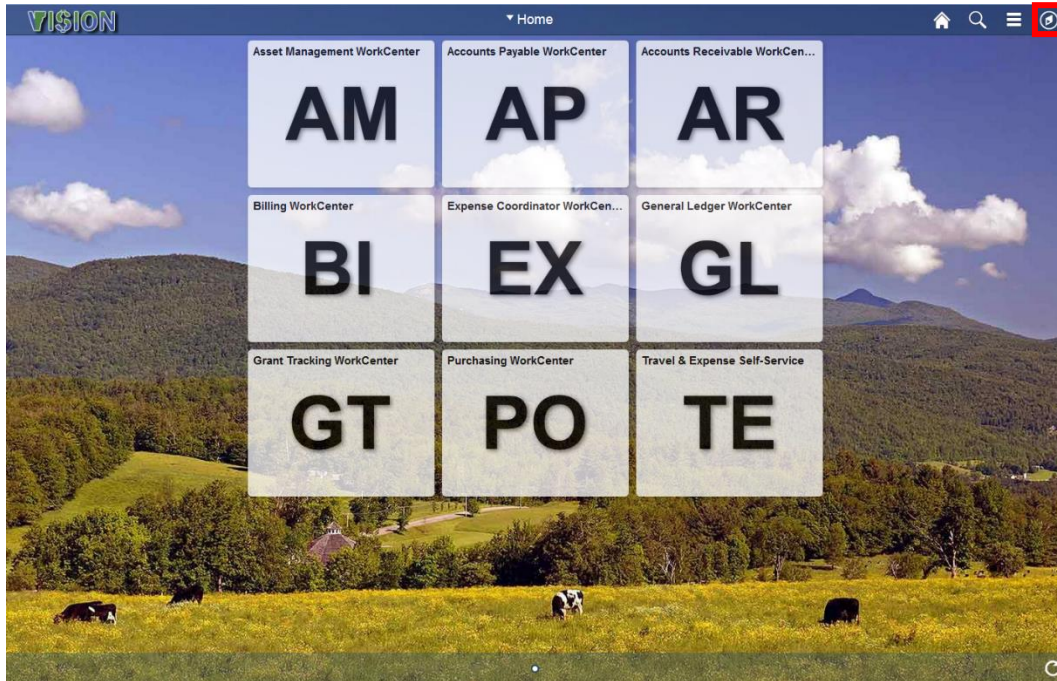
Click X to close

Click the **Refresh Pagelet** icon, you have added a report:

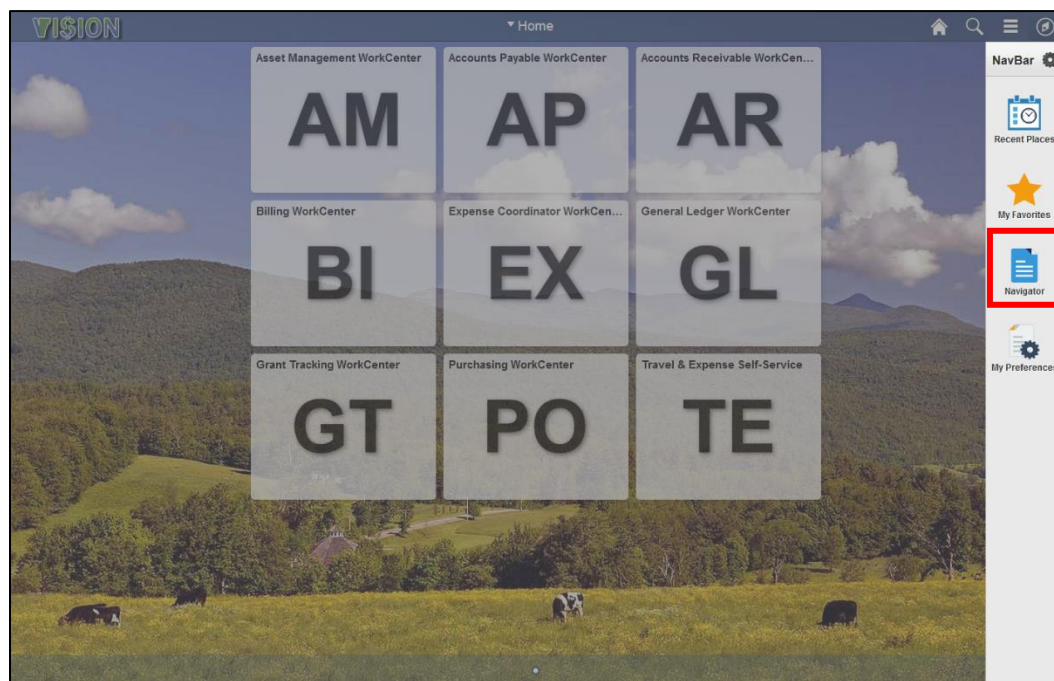


Using the NavBar

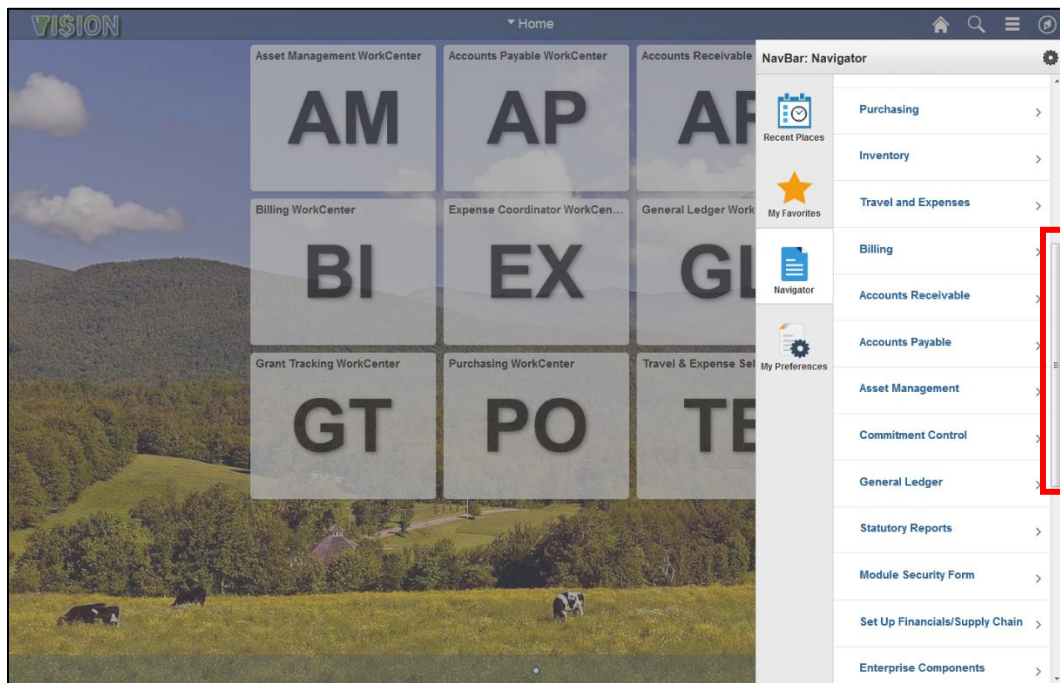
While WorkCenters have been designed to give you easy access to the VISION functionality you will need to accomplish most of your tasks you may also navigate by clicking the **NavBar** Icon:



Click the **Navigator** Icon:



Scroll and drill down to the functionality you want and click on the link:



Page Navigation

The screenshot shows a web application interface for 'Requisitions'. At the top, there is a dark blue header bar with a '< Home' link on the left and the title 'Requisitions' on the right. Below the header, the main content area has a title 'Requisitions' and a sub-header 'Use the following search to look for an existing Requisition.' Below this, there are three buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. A 'Search Criteria' section follows, containing several search fields: 'Business Unit' (with a dropdown and a text input containing '01110'), 'Requisition ID' (with a dropdown set to 'begins with' and a text input), 'Requisition Name' (with a dropdown set to 'begins with' and a 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 fields are checkboxes for 'Hold From Further Processing' and 'Case Sensitive', and a text input for 'Limit the number of results to (up to 300):' with the value '300'. At the bottom of the search criteria section, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page, there are three links: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Three blue circles with numbers 1, 2, and 3 are overlaid on the image. Circle 1 is at the top left, pointing to the 'Find an Existing Value' button. Circle 2 is at the bottom right, pointing to the 'Save Search Criteria' button. Circle 3 is at the bottom left, pointing to the 'Search' button.

1

2

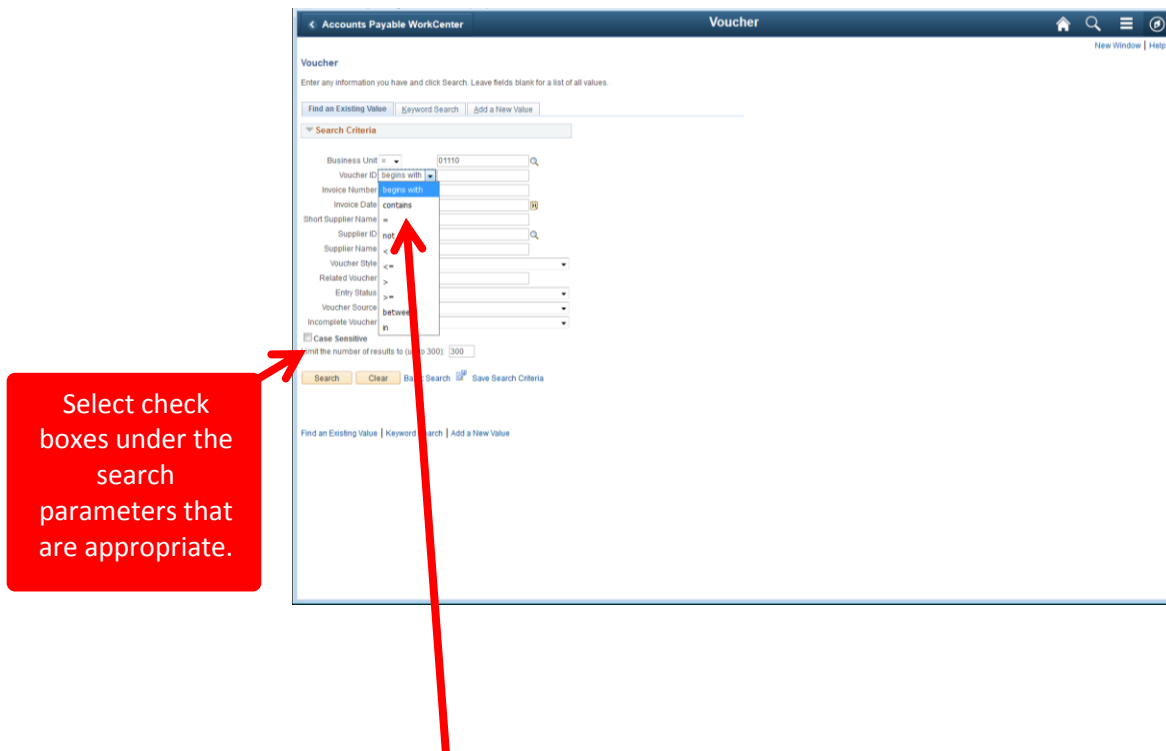
3

The above screenshot demonstrates several common navigation features.

1. Tabbed pages – displayed as folder tabs
2. Links – displayed as blue text
3. Buttons – 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.



- 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 | Keyword Search | Add a New Value

Search Criteria

Business Unit: 01110
 Voucher ID: contains 0
 Invoice Number: begins with
 Invoice Date: 08/05/2018
 Short Supplier Name: begins with
 Supplier ID: begins with
 Supplier Name: begins with
 Voucher Style: begins with
 Entry Status: begins with
 Voucher Source: begins with
 Incomplete Voucher: begins with
 Case Sensitive
 Limit the number of results to (up to 300): 300

Search | Clear | Basic Search | Save Search Criteria

Search Results

View All | 300 results are displayed.

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	00007671	090518 COMMENT	600	600	08/03/2018	RUTOPTICAL-001	0000001234	Rutland Optical Inc.	Regular	(blank)	Postable	Online	Complete
01110	00007670	ADJ CLOSE 090418	-20	-20	08/05/2018	HIGHGATEAP-001	0000007818	Highgate Apartments	Adjustment	(blank)	Postable	Online	Complete
01110	00007669	REG CLOSE 090418	35	35	08/05/2018	HIGHGATEAP-001	0000007818	Highgate Apartments	Regular	(blank)	Postable	Online	Complete
01110	00007667	DISCOUNT 083118 TR	100	100	08/01/2018	CLARKCOMMUN-001	0000003536	Clark Communication Electronics	Regular	(blank)	Postable	Online	Complete
01110	00007666	ADJUSTMENT 083118 TR	-15	-15	08/01/2018	UNICEL-001	0000000983	Unicel	Adjustment	00003724	Postable	Online	Complete
01110	00007665	CHANGE VOUCHER 8/30/2018	250	250	07/27/2018	RUTCITYTRE-001	0000040495	Rutland City Treasurer	Regular	(blank)	Postable	Online	Complete
01110	00007664	CF-12A 08292018	1000	1000	08/29/2018	WBMASONCOI-001	0000283240	W.B. Mason Co., Inc.	Regular	(blank)	Recycle	Online	Complete
01110	00007663	82918-10	50	50	07/26/2018	MCRATRUCK-001	00000005102	McRae Truck & Auto	Regular	(blank)	Postable	Online	Complete
01110	00007662	82918-09	50	50	07/26/2018	MCRATRUCK-001	00000005102	McRae Truck & Auto	Regular	(blank)	Postable	Online	Complete
01110	00007661	82918-08	0	0	07/26/2018	MCRATRUCK-001	00000005102	McRae Truck & Auto	Regular	(blank)	Postable	Online	Complete
01110	00007660	82918-07	50	50	07/26/2018	MCRATRUCK-001	00000005102	McRae Truck & Auto	Regular	(blank)	Postable	Online	Complete
01110	00007659	82918-06	50	50	07/26/2018	MCRATRUCK-001	00000005102	McRae Truck & Auto	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 **Navigator** icon, and then the **Purchasing** link:

VISION Home

Asset Management WorkCenter | Accounts Payable WorkCenter | Accounts Receivable WorkCenter | Bill Management WorkCenter

Expense Coordinator WorkCenter | General Ledger WorkCenter | Grant Tracking WorkCenter | Procurement WorkCenter

Purchasing WorkCenter | Travel & Expense Self-Service

NavBar: Navigator

Recent Places

My Favorites

My Preferences

Suppliers >

Procurement Contracts >

Purchasing >

Inventory >

Sourcing >

Engineering >

Manufacturing Definitions >

Production Control >

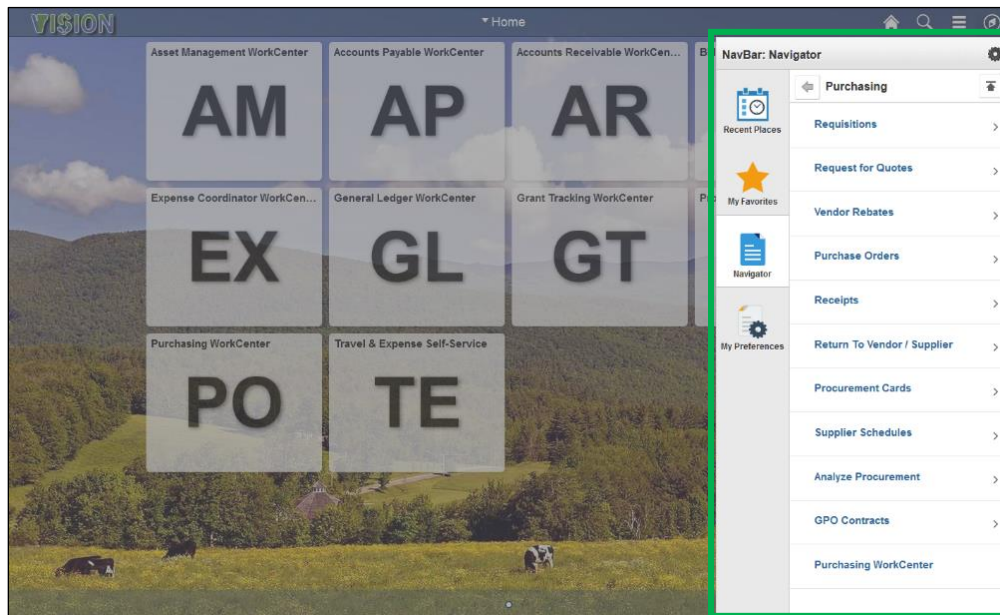
Quality >

Supply Planning >

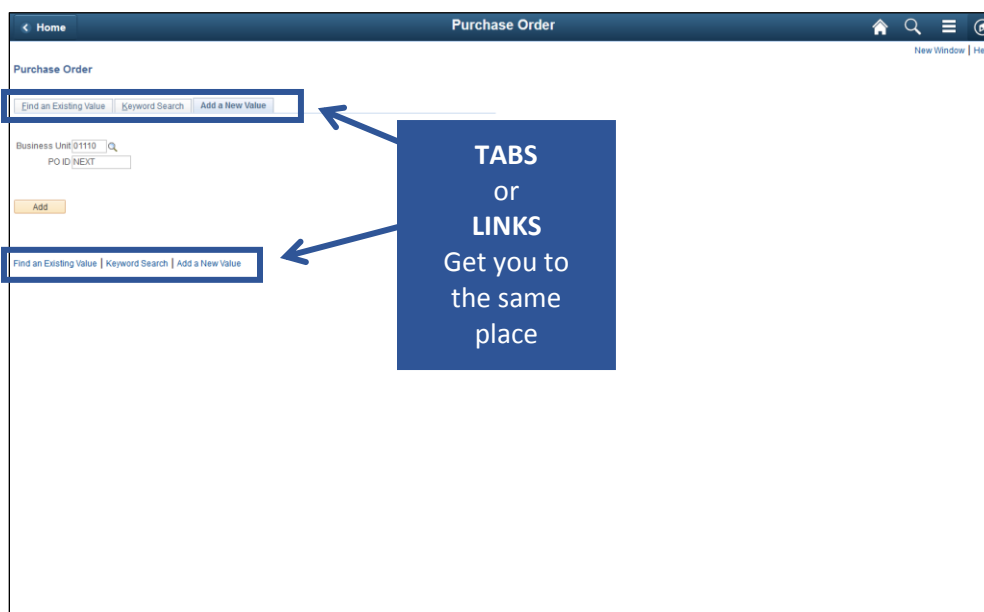
Grants >

Program Management >

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



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



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

Purchase Order

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

Find an Existing Value | Keyword Search | Add a New Value

Search Criteria

Business Unit: 01110

PO ID begins with:

Purchase Order Date:

PO Status:

Short Supplier Name begins with:

Supplier ID begins with:

Supplier Name begins with:

Buyer begins with:

Buyer Name begins with:

PO Type:

Purchase Order Reference begins with:

Hold From Further Processing: ☐

Case Sensitive: ☐

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

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Keyword Search | Add a New Value

Purchase Order

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

Find an Existing Value | Keyword Search | Add a New Value

Search Criteria

Business Unit: 01110

PO ID begins with:

Purchase Order Date:

PO Status:

Short Supplier Name begins with:

Supplier ID begins with:

Supplier Name begins with:

Buyer begins with:

Buyer Name begins with:

PO Type:

Purchase Order Reference begins with:

Hold From Further Processing: ☐

Case Sensitive: ☐

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

Search | Clear | Basic Search | Save Search Criteria

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	0000000332	08/25/2018	Dispatched	CHERRYROAD-001	0000084643	CherryRoad Technologies Inc	KSYMOMDS Karen L Symonds	Services contact for po-25	N		N
01110	0000000931	08/24/2018	Open	SIERRA-CED-001	0000362548	Sierra-Cedar, Inc.	KSYMOMDS Karen L Symonds	Services PO-101	N		N
01110	0000000929	08/15/2018	Dispatched	IRVING ENE-002	0000001293	Irving Energy	KSYMOMDS Karen L Symonds	General AP109 Testing	N		N
01110	0000000928	08/13/2018	Approved	IRVING ENE-002	0000001293	Irving Energy	KSYMOMDS Karen L Symonds	General AP109 Testing	N		N
01110	0000000927	08/10/2018	Dispatched	J.A. RUSSO-001	0000362458	J.A. Russo Paving, Inc.	KSYMOMDS Karen L Symonds	General (blank)	N		N
01110	0000000926	07/10/2018	Dispatched	OFFICEMAX-001	0000000932	Office Max	KSYMOMDS Karen L Symonds	Product (blank)	N		N
01110	0000000925	04/27/2018	Dispatched	WBMASONCOH-001	0000283240	W.B. Mason Co., Inc.	CTOUCHET Caitlin Ann Touchette Product	Office Supplies	N		N
01110	0000000924	04/25/2018	Dispatched	CELCO PAR-001	0000010682	Celco Partnership	CTOUCHET Caitlin Ann Touchette Services	CPS VERIZON SERVICE & EQUIPMEN	N		N
01110	0000000923	04/25/2018	Dispatched	VCHOWWP-001	0000041408	Vermont Correctional Industries/Vermont	CTOUCHET Caitlin Ann Touchette Product	CPS-PRINTED ENVELOPES	N		N
01110	0000000921	03/28/2018	Dispatched	WBMASONCOH-001	0000283240	W.B. Mason Co., Inc.	CTOUCHET Caitlin Ann Touchette Product	Office Supplies	N		N
01110	0000000920	03/28/2018	Dispatched	WBMASONCOH-001	0000283240	W.B. Mason Co., Inc.	CTOUCHET Caitlin Ann Touchette Product	Office Supplies	N		N

Mandatory fields are indicated with an "*" – additional fields may be required as part of your department procedures.

Change Order icon

Line Details icon

Schedule icon

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

At the bottom of each page there are function buttons (i.e. Save, Return to Search, Previous in List, Next in List, Refresh, OK, Cancel).

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

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 or Optional?	Required	Required	Required	Required	Optional	Optional	Both	Both

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
1	July 1-31, 2018	2019
2	August 1-31, 2018	2019
3	September 1-30, 2018	2019
4	October 1-31, 2018	2019
5	November 1-30, 2018	2019
6	December 1-31, 2018	2019
7	January 1-31, 2019	2019
8	February 1-28, 2019	2019
9	March 1-31, 2019	2019
10	April 1-30, 2019	2019
11	May 1-31, 2019	2019
12	June 1-30, 2019	2019
998*	June 30, 2019	2019
1	July 1-31, 2019	2020

* 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.

Chartfield Definitions

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 were 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:

Account Type	<i>Numbering Scheme</i>
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:

Fund Number	Fund Name
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>

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 expenditure's 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)

Asset ExpressAdd

Home

Cost / Asset Information

Asset Information

Unit 01110 Asset ID NEXT

Profile ID Trans Date 09/22/2018

Description Acctg Date 09/22/2018

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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Asset Additional Information

Save Notify Add

Click the magnifying glass

Asset ExpressAdd

Home

Cost / Asset Information

Asset Information

Unit 01110

Profile ID

Description

Location

Tag Number

☐ Accum Depr in Current Pd

Asset Cost Information

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

Chartfields

Fund	Dept	Program	Class	Project
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Asset Additional Information

Save Notify Add

Look Up Dept

SetID STATE

Department begins with

Manager Name begins with

Look Up Clear Cancel Basic

Lookup

Search Results

Only the first 300 results of a possible 4687 can be displayed.

View 100 First 1-300 of 300 Last

Department	Description	Manager Name
0118000000	Buildings & Gen Serv - Capital	(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)
1100020000	Secretary of Administration	(blank)
1100020100	SOA Operating	(blank)
1100020600	SOA - Health Care Reform	(blank)
1100020700	VT HR 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)
1100129000	AoA-All Other Insurance	(blank)

All DeptIDs are displayed. To view DeptIDs for your BU only, enter the first four digits of your BU (without the leading 0) before clicking on 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.

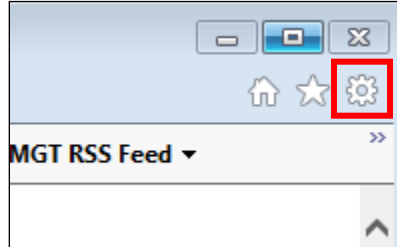
Your use of the web determines how often the cache should be cleared. A good practice is to clear cache at least once a week to avoid error messages such as "Page Cannot Be Displayed" when trying to log in or "invalid URL" when navigating. If you receive either of these messages, follow these steps before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

Internet Explorer

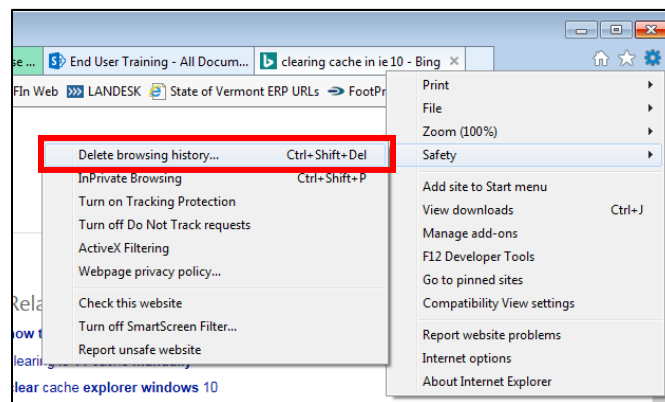
Note: The following step-by-step instructions are for Internet Explorer 11. The version of Internet Explorer on your computer may look different, but the concept is the same. Any questions about your computer should be directed to your desktop support staff.

Step 1 – Open Internet Explorer

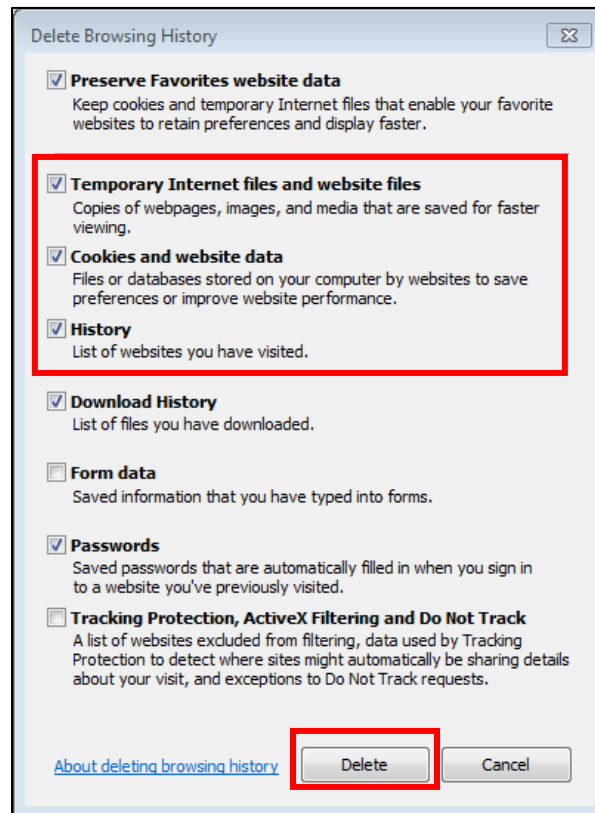
Step 2 – Click on the **Gear** icon



Step 3 – Hover on **Safety** then click on **Delete Browsing History**:



Step 4 – Select the data you want to delete (Temporary Internet Files; Cookies and website data; and History at minimum) and click **Delete**:



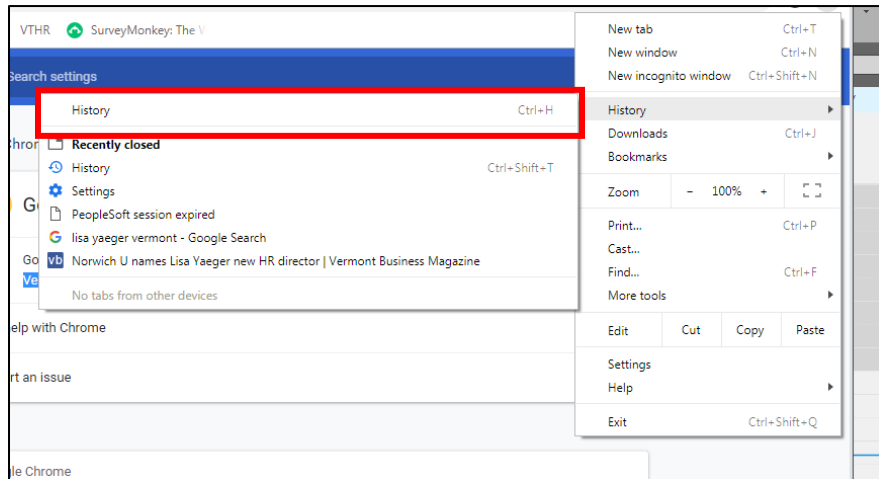
Google Chrome

Note: The following step-by-step instructions are for Chrome version 69.0.3497.100. 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.

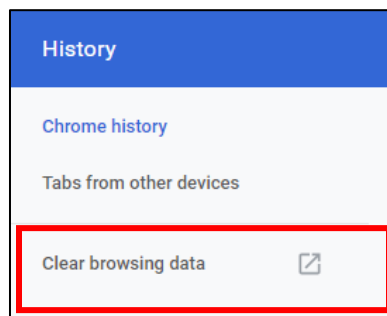
Step 1 – Click on the **three dots** in the upper-right corner:



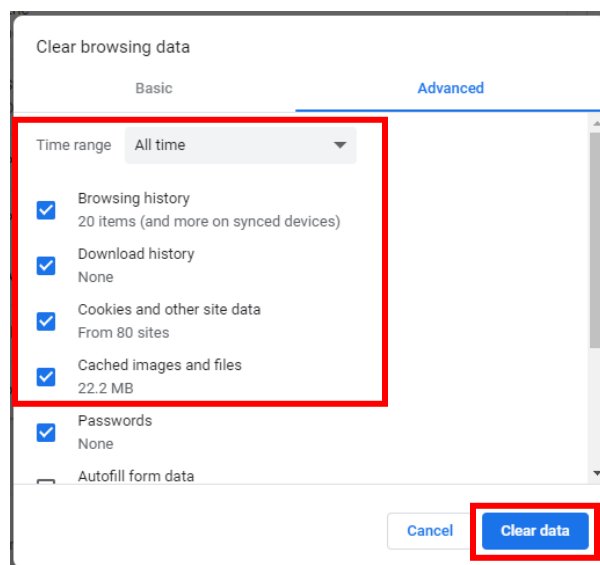
Step 2 – Hover over History and click on **History** in the pop-up window:



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**:

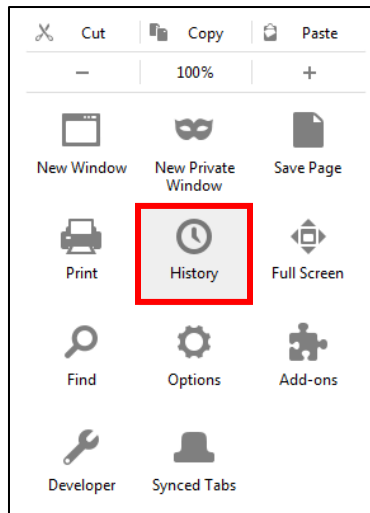


Mozilla Firefox

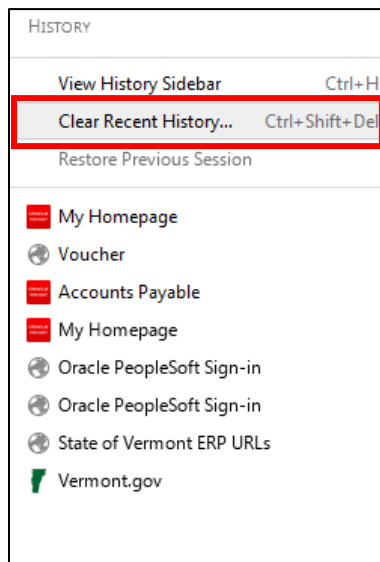
Step 1 – Click on the **three-bar icon** in the upper-right corner:



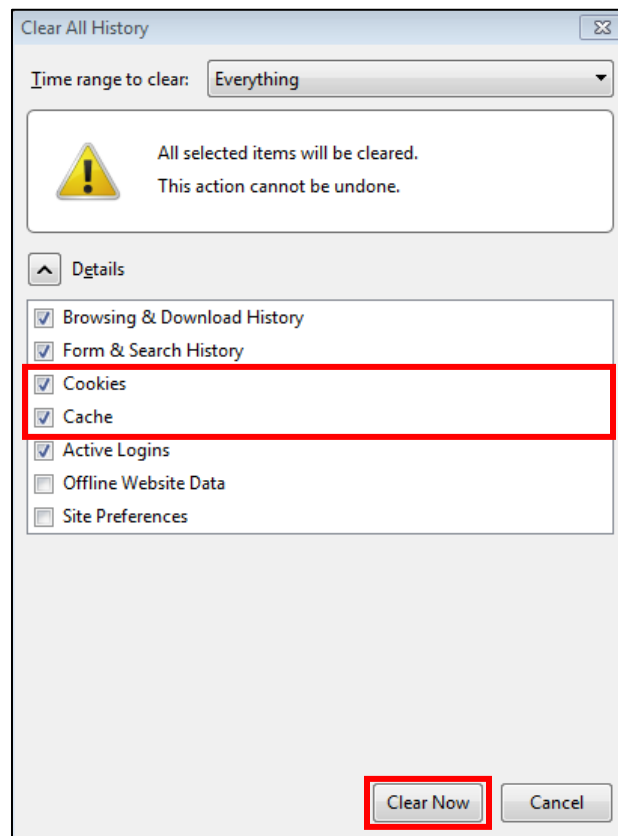
Step 2 – Click on **History**:



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**:

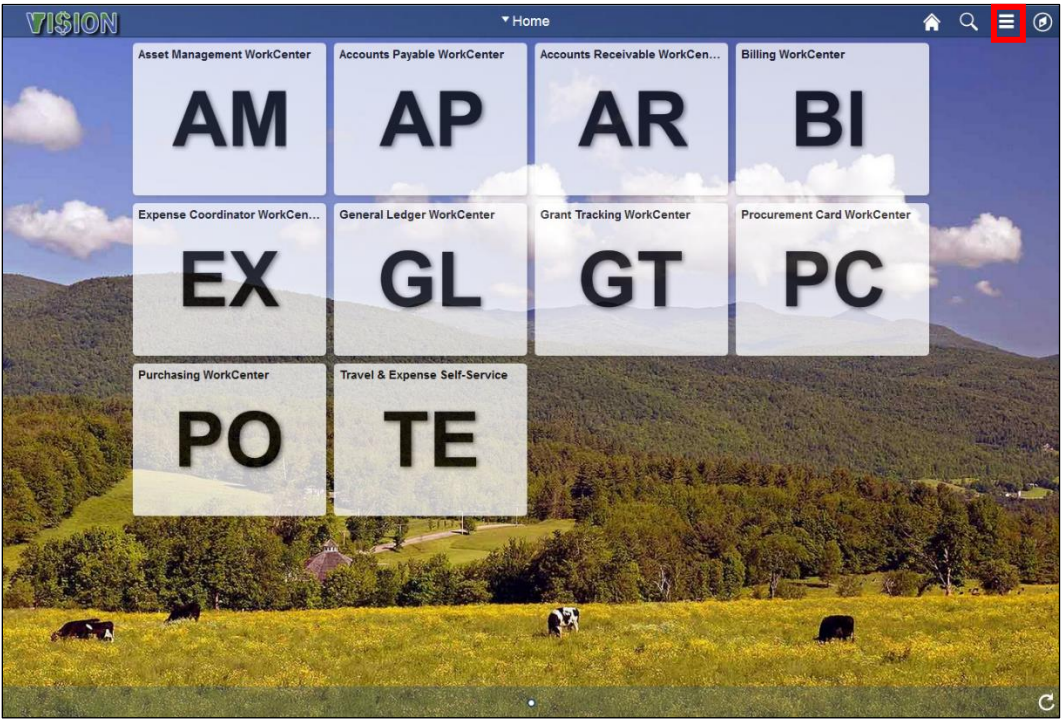


A keyboard shortcut that works in most browsers is **Ctrl + Shift + Delete**.

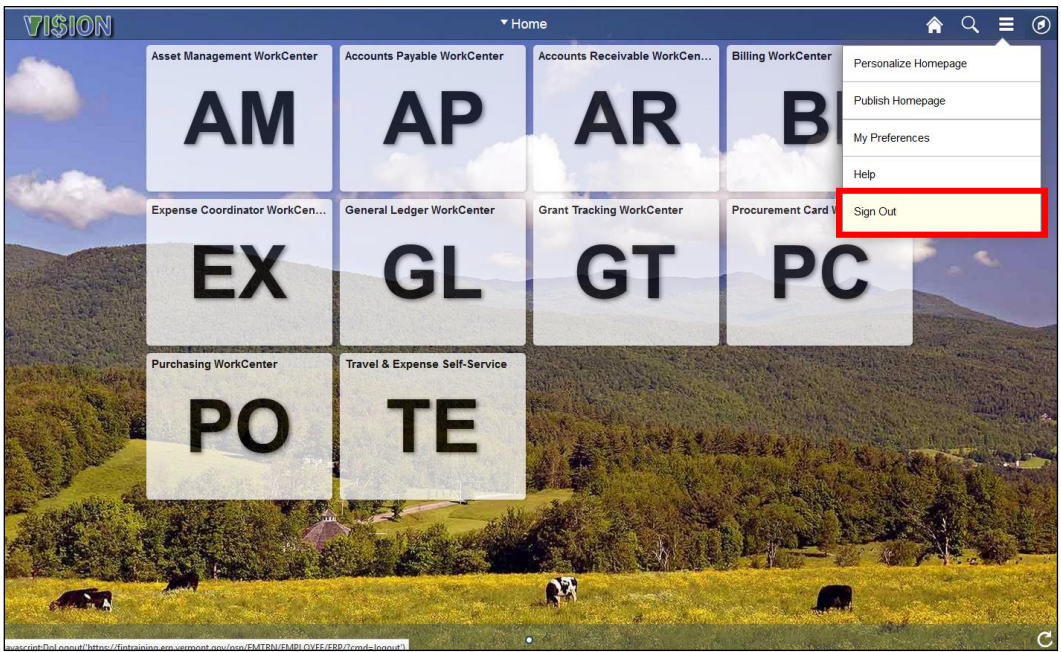
Following these steps will clear the internet files and most often removes any cause of error messages. If this does not resolve the issue, contact VISION Help Desk at 828-6700, option 2.

Logging Out

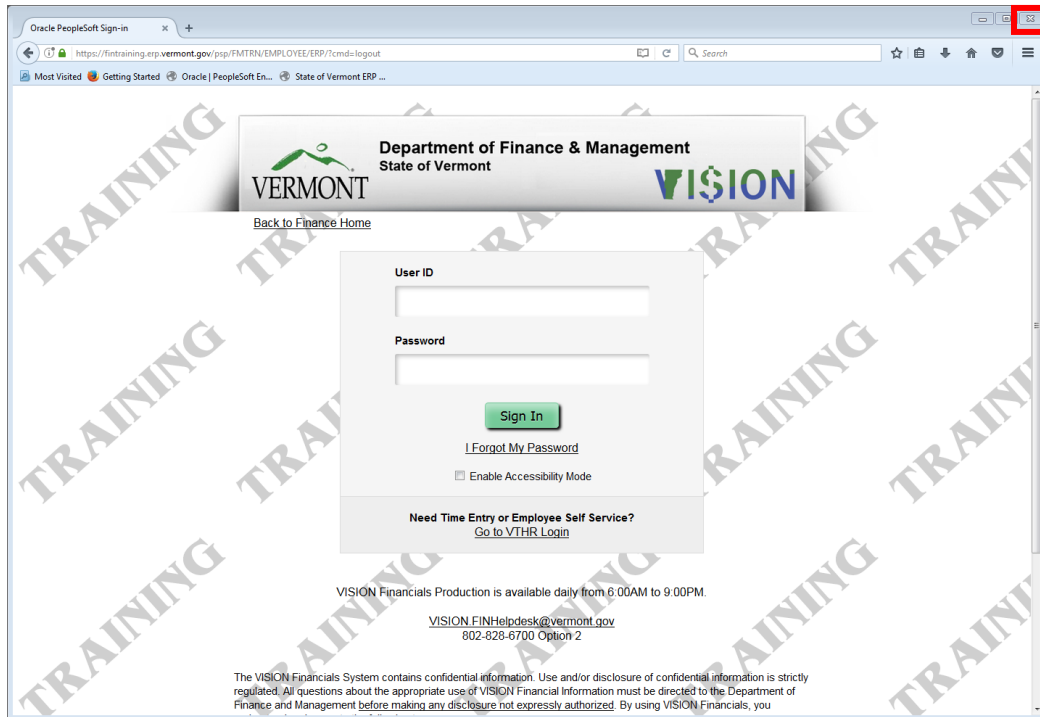
Before logging out, be sure that all your work is saved or processed. Click on the **Actions List** icon:



Click **Sign Out**:





















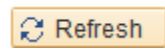
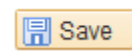
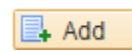
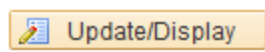
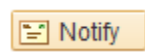

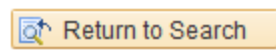
Exit from the browser:

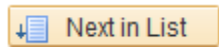


Following these steps ensures that your login has completely disconnected from the PeopleSoft applications and servers.

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 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 – 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)

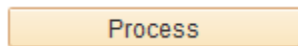
	To refresh a transaction on your page
	To save a transaction
	To add a new transaction
	To update/display a transaction
	This button is not currently used by SOV
	To dispatch a PO
	Return to the search functionality of the page



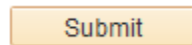
Move to the next item in the list



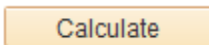
Move to the previous item in the list



Process a transaction such as a journal



Submit – Submit a transaction for approval



This button is not currently used by SOV