



## **Submitting a ChartField Request Form**

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

**State of Vermont**  
**Department of Finance & Management**  
**VISION 9.2**

**January 2019**

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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 controls:

- Request ID:** A text field containing 'NEXT'.
- SetID:** A text field containing 'STATE' with a magnifying glass icon to its right.
- Field Name:** A text field containing 'ACCOUNT' with a magnifying glass icon to its right.
- Field Action:** A drop-down menu with 'Add' selected.
- Field Value:** A text field containing '551001' with a magnifying glass icon to its right.
- Buttons:** At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the fields, there 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 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

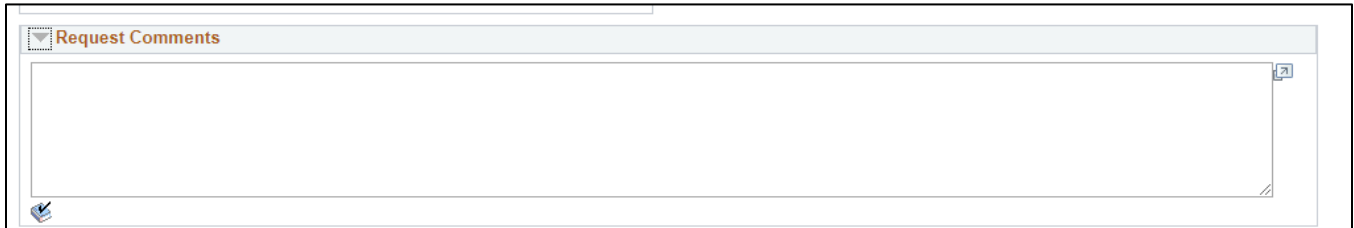
**Monetary Account Type** – Select the appropriate account type from the drop-down menu

**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 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	<a href="#">Copy</a>
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**

**Trees**

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

Requester  
Entered By ETEST Eric John Hoefel  
Updated By ETEST Eric John Hoefel

Entered Date/Time 10/30/2018 3:41PM  
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	<a href="#">Copy</a>
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**

☐ 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: [View Approval Flow](#) [Go](#)

Requester ETEST Eric John Hoefel  
Entered By ETEST Eric John Hoefel  
Updated By ETEST Eric John Hoefel

Entered Date/Time 10/30/2018 3:41PM  
Updated Date/Time 10/30/2018 3:47PM

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)



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

Approval Flow

Help

**Field Request Approval Stage**

Request ID 0000000007:Pending

View/Hide Comments

Start New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

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

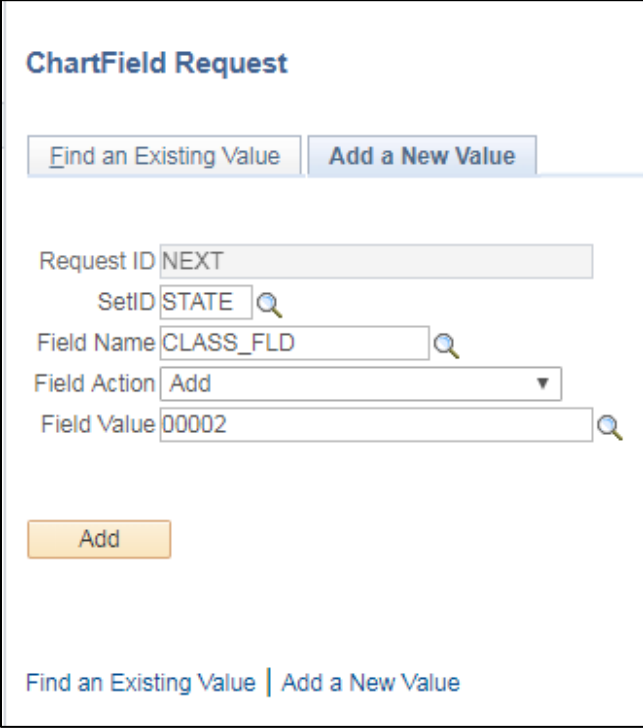
## Completing a ChartField Request Form for a Class Code

**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. Below the 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 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

**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.

Request Comments

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

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

Request ID

NEXT

Request Status

Newly Created

Field Action

Add

Telephone

802/828-0678

\*Business Unit

01110

SetID

STATE

Field Name

CLASS\_FLD

\*Field Value

00002

Email ID

john.becker@vermont.gov

Core Information

\*Effective Date

01/29/2019

\*Status

Active

\*Description

Test Class

\*Short Description

Test

Long Description

Business Justification

Attachments (0)

Request Comments

Questions

\*1.

What is the reason for the new or updated Class code?

Answer

\*2.

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

Answer

3.

Any additional comments about this request?

Answer

Trees

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 0000000068	SetID STATE <span>Copy</span>
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)

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

Request ID 0000000068	SetID STATE <span>Copy</span>
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**

**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

RequesterJBECKERJohn M Becker

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

Updated ByJBECKERJohn M BeckerUpdated 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 is a link that says 'Find an Existing Value | 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

**Description** – Enter a description (up to 30 characters)

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

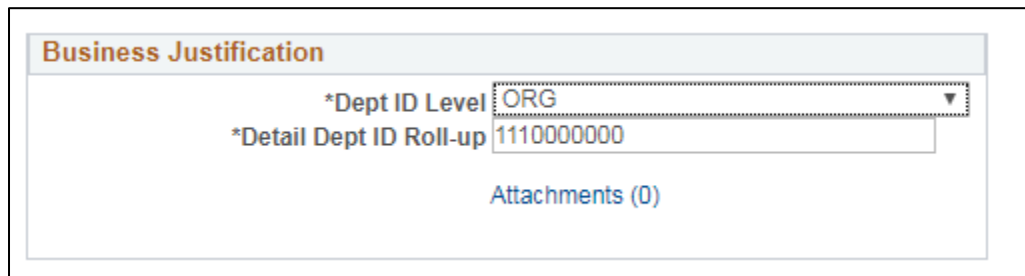
**Long Description** – Click the [long Description](#) link – this is an optional field where you can add any additional information about the Dept ID that the requestor believes is important, for example a full description of the purpose for the Dept ID.

**Attributes** – Leave blank - only used by VISION Financial Operations



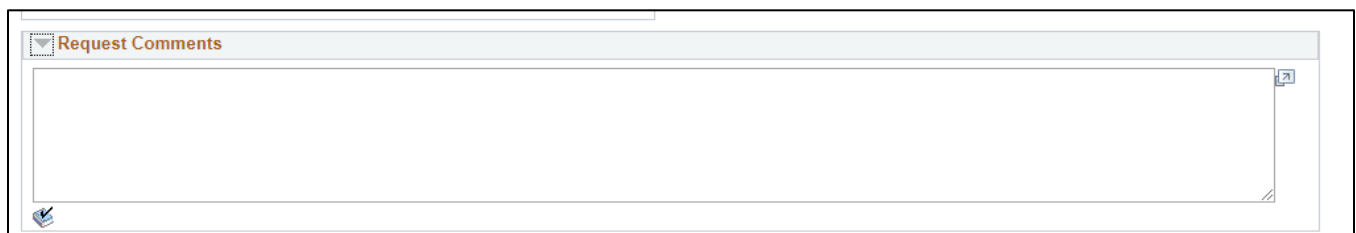
**Dept ID Level** – Select ‘Approp’, ‘Detail’, or ‘ORG’

**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 form titled "Business Justification" in a light blue header. Below the header, there are two fields: "\*Dept ID Level" with a dropdown menu showing "ORG" and a small 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)".

Business Justification	
*Dept ID Level	ORG
*Detail Dept ID Roll-up	1110000000
<a href="#">Attachments (0)</a>	

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

A screenshot of a form titled "Request Comments" in a light blue header. Below the header is a large, empty text area for entering comments. There is a small icon in the bottom left corner and a small icon in the bottom right corner of the text area.

Request Comments
<div></div>

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	Business Justification
*Effective Date <input type="text" value="01/30/2019"/>	*Dept ID Level <input type="text"/>
*Status <input type="text" value="Active"/>	*Detail Dept ID Roll-up <input type="text"/>
*Description <input type="text"/>	Attachments (0)
*Short Description <input type="text"/>	
<a href="#">Long Description</a>	
<a href="#">Attributes</a>	

► 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	<input type="text"/>	Go
Requester		
Entered By	JBECKER	John M Becker
Entered Date/Time	01/30/2019 11:00AM	
Updated By	JBECKER	John M Becker
Updated Date/Time	01/30/2019 11:00AM	

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	0000000069	SetID	STATE	<a href="#">Copy</a>
Request Status	Newly Created	Field Name	DEPTID	
Field Action	Add	*Field Value	1110002026	
Telephone	802/828-0678			
*Business Unit	01110 <a href="#">Q</a>			
<b>Core Information</b>		<b>Business Justification</b>		
*Effective Date	01/30/2019	*Dept ID Level	ORG	
*Status	Active	*Detail Dept ID Roll-up	1110000000	
*Description	TEST DEPT ID			
*Short Description	TEST			
	<a href="#">Long Description</a>			
	<a href="#">Attributes</a>			
		<a href="#">Attachments (0)</a>		

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

Request ID	0000000069	SetID	STATE	<a href="#">Copy</a>
Request Status	Newly Created	Field Name	DEPTID	
Field Action	Add	*Field Value	1110002026	
Telephone	802/828-0678			
*Business Unit	01110 <a href="#">Q</a>			
<b>Core Information</b>		<b>Business Justification</b>		
*Effective Date	01/30/2019	*Dept ID Level	ORG	
*Status	Active	*Detail Dept ID Roll-up	1110000000	
*Description	TEST DEPT ID			
*Short Description	TEST			
	<a href="#">Long Description</a>			
	<a href="#">Attributes</a>			
		<a href="#">Attachments (0)</a>		
<a href="#">Request Comments</a>				
<a href="#">Questions</a>				
<a href="#">Trees</a>				
Request Action	Submit for Approval			
	<a href="#">Go</a>			
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 Unit01110

Core Information

\*Effective Date01/30/2019

\*StatusActive

\*DescriptionTEST DEPT ID

\*Short DescriptionTEST

Long Description

Attributes

Business Justification

\*Dept ID LevelORG

\*Detail Dept ID Roll-up1110000000

Attachments (0)

Request Comments

Questions

Trees

Request ActionGoView Approval Flow

RequesterJBECKERJohn M Becker

Entered ByJBECKERJohn M BeckerEntered Date/Time01/30/2019 11:00AM

Updated ByJBECKERJohn M BeckerUpdated Date/Time01/30/2019 11:04AM

SaveReturn to SearchNotify

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:PendingView/Hide CommentsStart New Path

Path for Fields Approval

Pending

Multiple Approvers

Chartfield FINOPS Approvers

Comments

Return

<b>Approver #1</b>	
Name:	Peggy Brooks
Description:	Peggy Brooks
<b>Approver #2</b>	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
<b>Approver #3</b>	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
<b>Approver #4</b>	
Name:	Joe Harris
Description:	Joe Harris
<b>Approver #5</b>	
Name:	Becker,John M
Description:	Becker,John M
<b>Approver #6</b>	
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

**Description** – Enter a description (up to 30 characters)

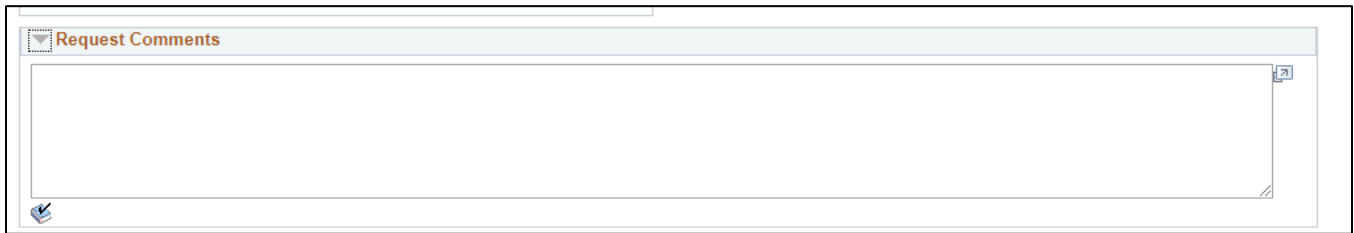
**Short Description** – Enter a short description (up to 10 characters)

**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.

Page 23 of 52

**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 entering comments. In the bottom-left corner of the white area, there is a small blue icon of a person with a speech bubble. 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	<a href="#">Copy</a>
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	<a href="#">Copy</a>
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 interface for managing requests. At the top, there's a field for '\*Business Unit' with the value '01110'. Below this, the 'Core Information' section 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'. To the right, the 'Business Justification' section has an 'Attachments (0)' link. Below these sections are expandable areas 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 and updated dates/times (01/30/2019 11:24AM and 11:25AM), and buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'U'.

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

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

The 'Approval Flow' window displays the 'Field Request Approval Stage' for 'Request ID 0000000007: Pending'. It includes links for 'View/Hide Comments' and 'Start New Path'. Under 'Path for Fields Approval', there's a 'Pending' status and a 'Multiple Approvers' section with 'Chartfield FINOPS Approvers' and a plus icon. A 'Comments' section is also visible, along with a 'Return' button at the bottom.

<b>Approver #1</b>	
Name:	Peggy Brooks
Description:	Peggy Brooks
<b>Approver #2</b>	
Name:	Collins,Nancy E
Description:	Collins,Nancy E
<b>Approver #3</b>	
Name:	Karen C Jaquish
Description:	Karen C Jaquish
<b>Approver #4</b>	
Name:	Joe Harris
Description:	Joe Harris
<b>Approver #5</b>	
Name:	Becker,John M
Description:	Becker,John M
<b>Approver #6</b>	
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 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 '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 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 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 Date/Time	
Entered By		Updated Date/Time	
Updated By			

**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

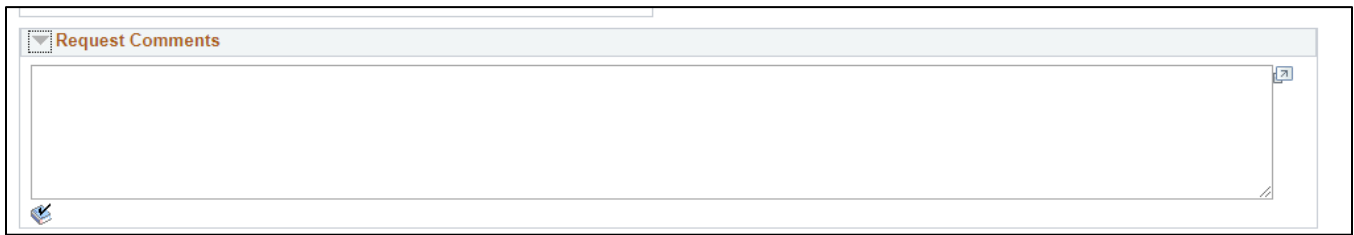
**Status** – Select ‘Active’ or ‘Inactive’ as appropriate

**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.



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

Answer the three questions below:

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

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

Click **Save**

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

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



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

Request ID	0000000071	SetID	STATE	<a href="#">Copy</a>
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 <a href="#">Q</a>			
<b>Core Information</b>		<b>Business Justification</b>		
*Effective Date		01/30/2019 <a href="#">B1</a>		
*Status		Active ▼		
*Description		Test Program		
*Short Description		Test		
<a href="#">Long Description</a>		<a href="#">Attachments (0)</a>		
<a href="#">Request Comments</a>				
<a href="#">Questions</a>				
<a href="#">Trees</a>				
Request Action		Submit for Approval ▼ <a href="#">Go</a>		
<b>Requester</b>				
Entered By	JBECKER	John M Becker	Entered Date/Time	01/30/2019 11:34AM
Updated By	JBECKER	John M Becker	Updated Date/Time	01/30/2019 11:34AM

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

\*Business Unit 01110

Core Information	Business Justification
*Effective Date 01/30/2019 *Status Active *Description Test Program *Short Description Test <a href="#">Long Description</a>	<a href="#">Attachments (0)</a>

► Request Comments

► Questions

► Trees

Request Action  [View Approval Flow](#)

Requester JBECKER	John M Becker	
Entered By JBECKER	John M Becker	Entered Date/Time 01/30/2019 11:34AM
Updated By JBECKER	John M Becker	Updated Date/Time 01/30/2019 11:35AM

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

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

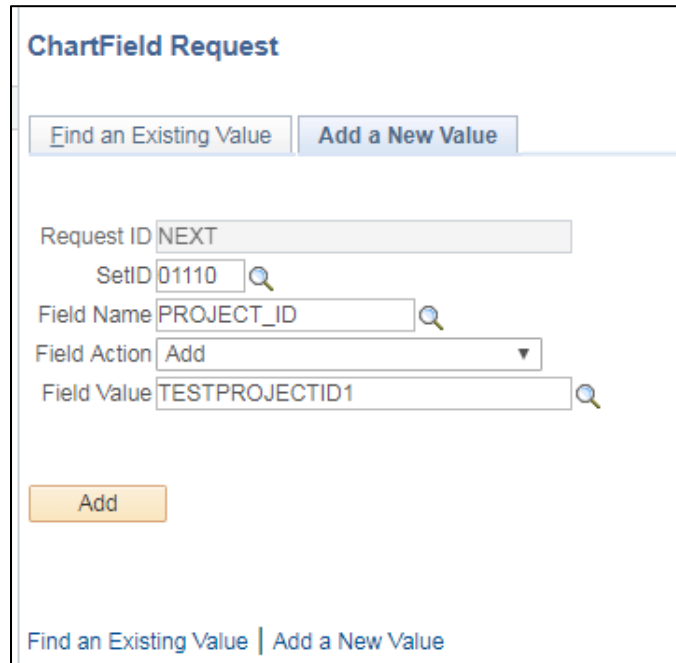
## Completing a ChartField Request Form for a Project ID

**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. 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 '01110' and a magnifying glass icon, 'Field Name' with the value 'PROJECT\_ID' and a magnifying glass icon, 'Field Action' with a dropdown menu showing 'Add', and 'Field Value' with the value 'TESTPROJECTID1' and a magnifying glass icon. 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 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

01/30/2019

\*Start Date

01/30/2019

\*Status

Active

\*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

**Start Date** – Enter the start date for the Project ID

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

**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.

Request Comments

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

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

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

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

**Core Information**

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

**Business Justification**

Attachments (0)

Request Comments

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

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

**Core Information**

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

**Business Justification**

Attachments (0)

Request Comments

Questions

Trees

Request Action

Submit for Approval ▼

Go

Requester

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

Save Notify

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

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 as JBECKER (John M Becker), entered and updated by JBECKER (John M Becker) on 01/30/2019 at 11:51AM. At the very bottom are 'Save', 'Return to Search', and 'Notify' buttons.

*Business Unit	01110		
<b>Core Information</b>			
*End Date	01/31/2022		
*Start Date	01/30/2019		
*Status	Active		
*Description	Test Project ID		
<b>Business Justification</b>			
Attachments (0)			
Request Comments			
Questions			
Trees			
Request Action	Go		
View Approval Flow			
Requester	JBECKER	John M Becker	
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		Return to Search	Notify

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.

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
<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' field, 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' field (NEXT) and a 'Help' link. Below this is a 'Details' section with a table. The table has columns: File Name, Show to Approver?, Description, User, Name, and Date/Time Stamp. The 'Show to Approver?' column has a checked checkbox. Below the table 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 an 'Add Attachment' button highlighted with a red rectangle, and 'OK' and 'Cancel' buttons.

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

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

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)

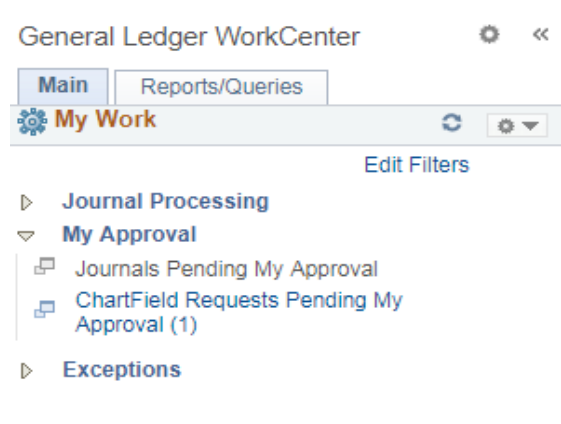
## Department Level Approval of a ChartField Request Form

**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 1 of 1 Last

**Request Details** More Details ...

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.

Add Comments

Nice Job!

245 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 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

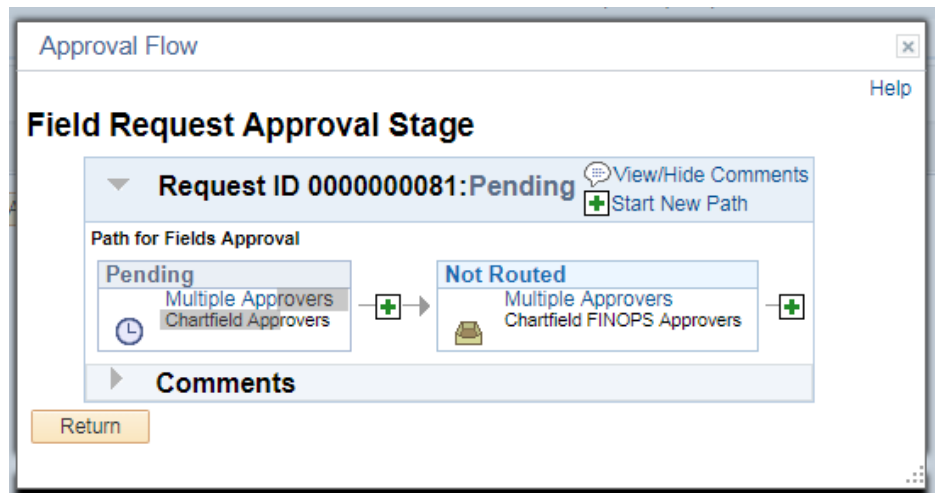
Approve

Deny

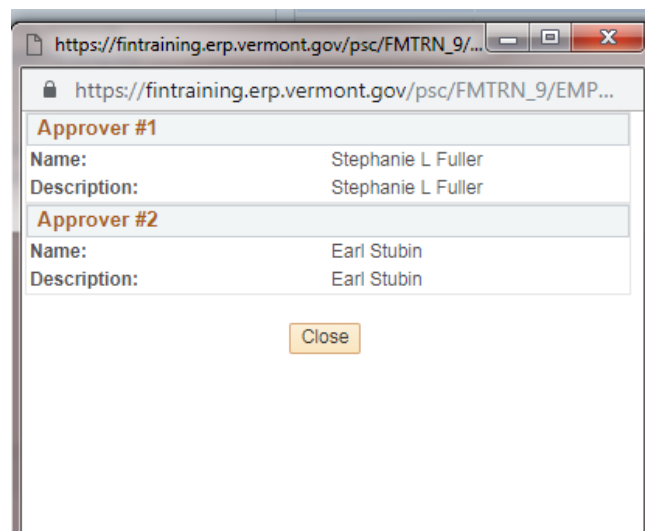
Hold

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...

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

Close

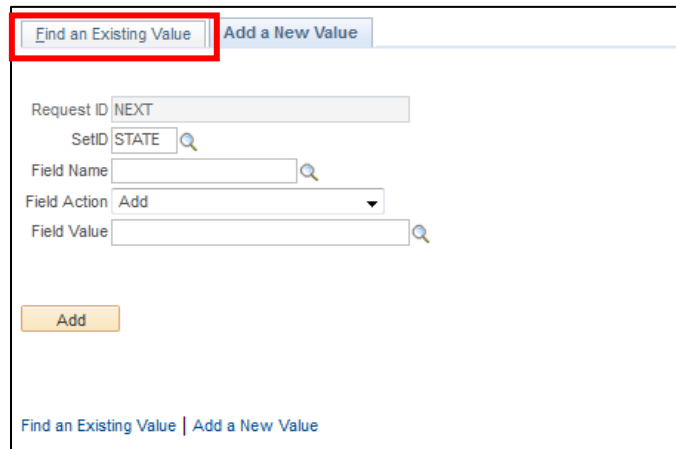
## Tracking a ChartField Request Status

**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 form titled 'ChartField Request'. At the top, there are two tabs: 'Find an Existing Value' (which is selected and highlighted with a red box) and 'Add a New Value'. Below the tabs, 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 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 =

Field Name begins with

Field Action =

Field Value begins with

**Request Status** =

Requester begins with

Entered By begins with

☐ Case Sensitive

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

[Basic Search](#)

**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 SetID STATE

Request Status Approved Field Name ACCOUNT

Field Action Add 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**

**Trees**

Request Action

Requester ETEST Eric John Hoefel

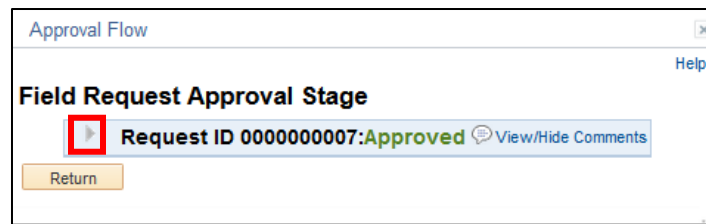
Entered By ETEST Eric John Hoefel

Updated By JBECKER Becker, John M

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

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

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:

