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

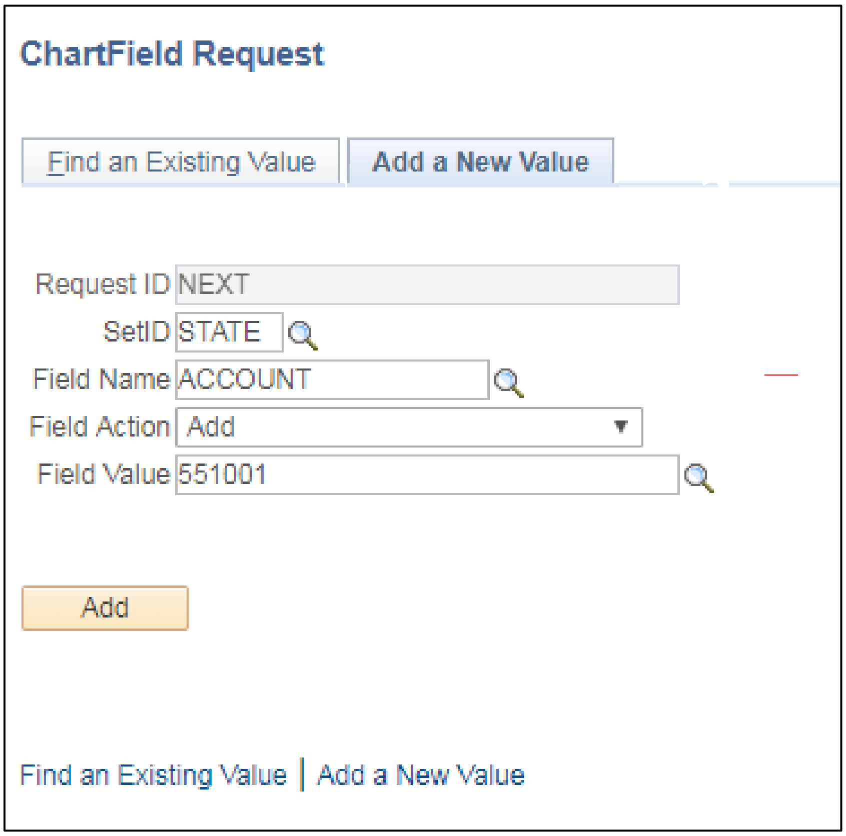
- Manual written

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:



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

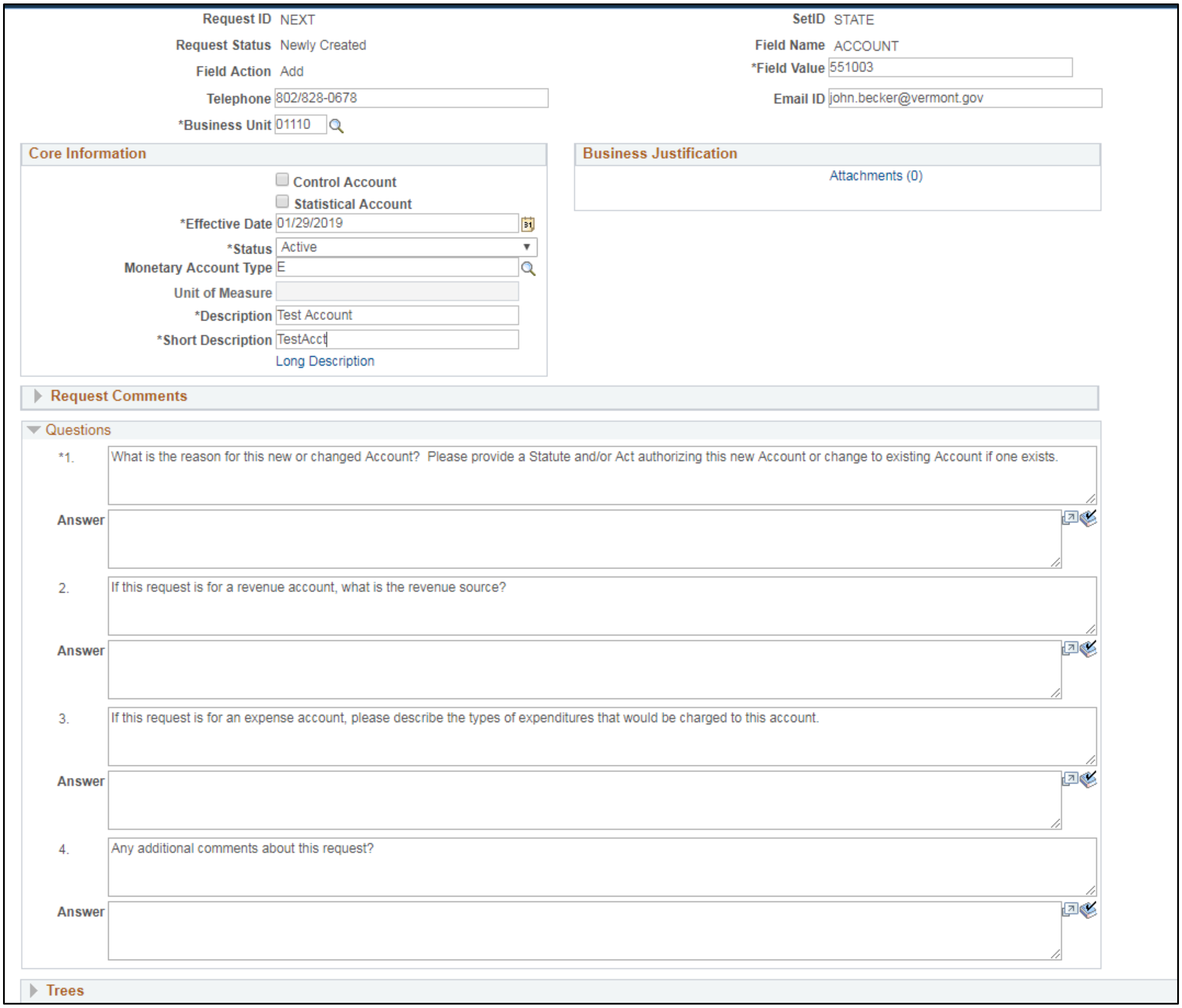
- Options are Add or Update

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:



Telephone – Enter the telephone number for the contact person

Business Unit – Enter the business unit for approval routing purposes

Control Account – Leave unchecked

Statistical Account – Leave unchecked

Effective Date – Enter the effective date for the chartfield change

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

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

Description – Enter a description (up to 30 characters)

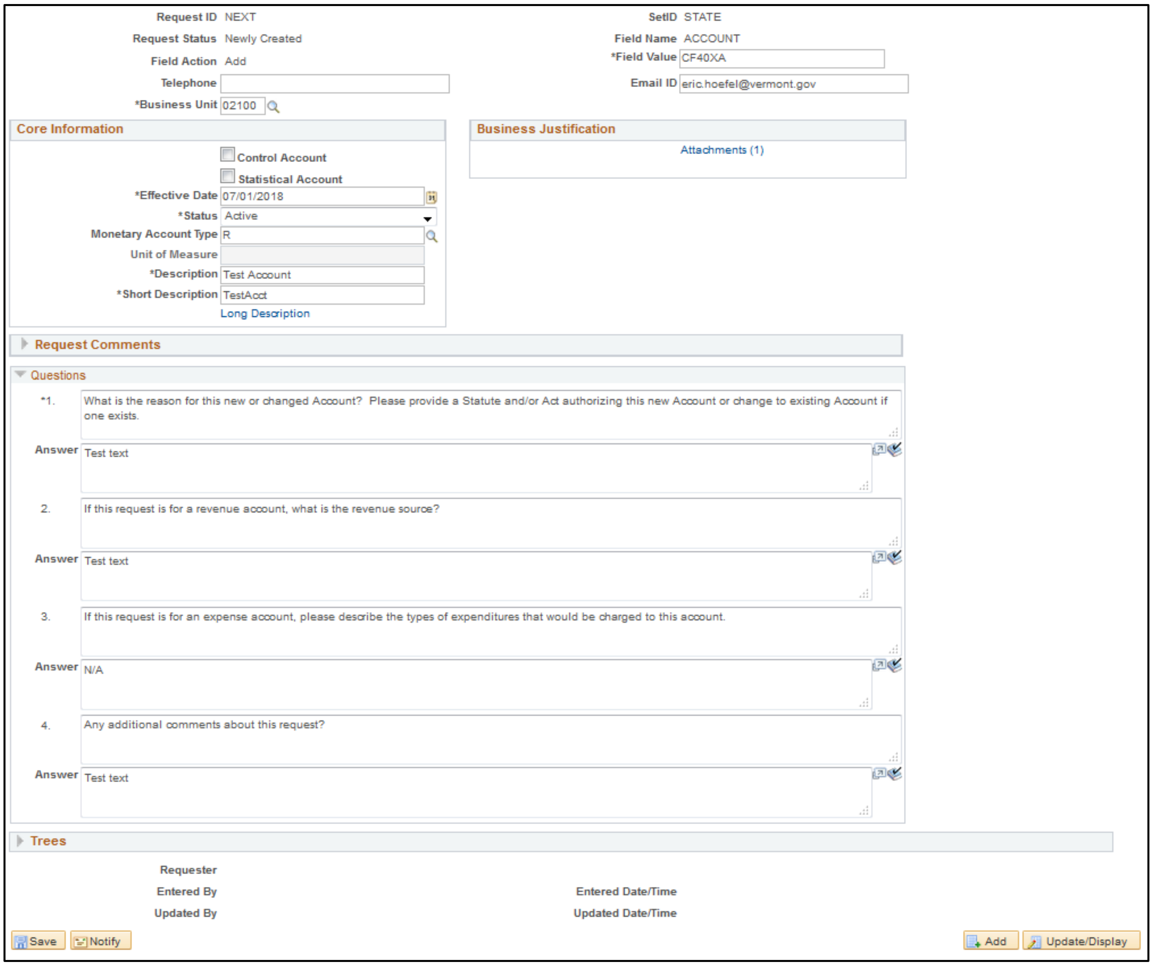
Short Description – Enter a short description (up to 10 characters)

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

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

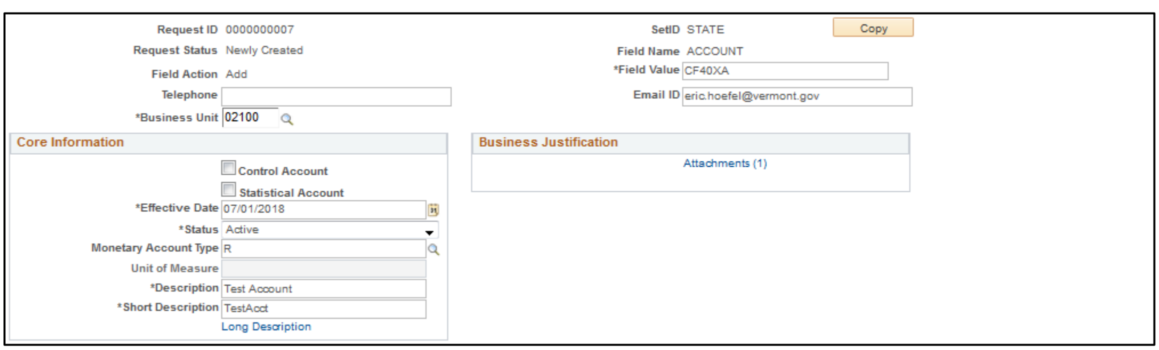
The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

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

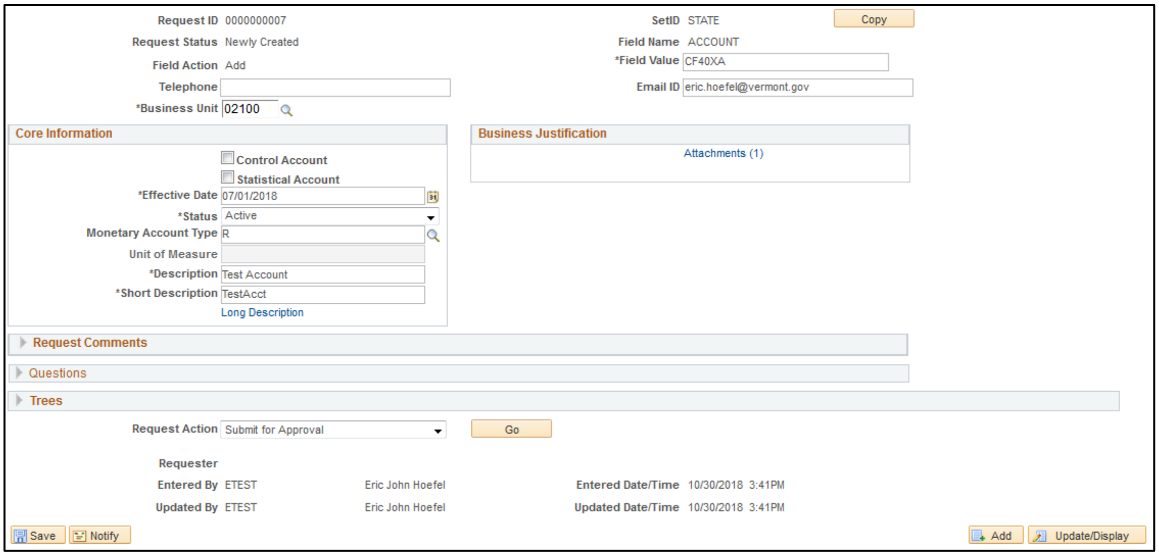


The **Trees** box is only used by VISION Financial Operations, **<u>no entry or selections</u>** should be made under the Trees box

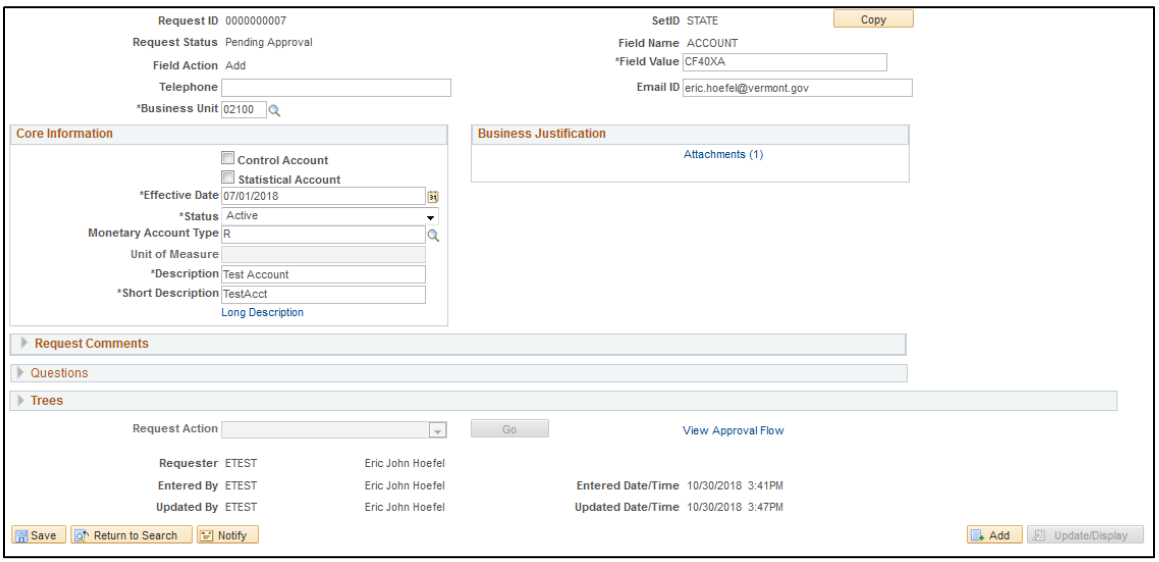
Your request has been assigned a **Request ID** number:



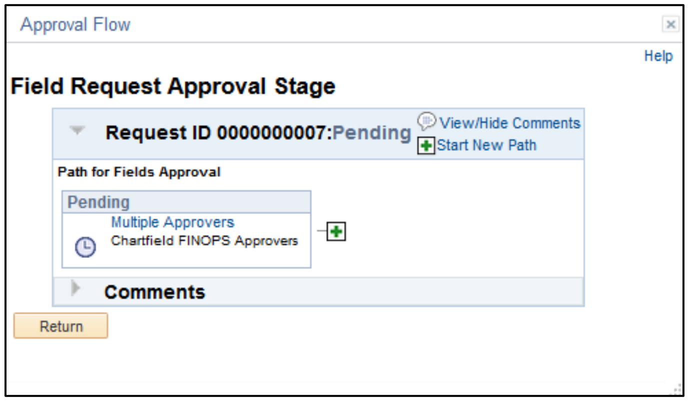
Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

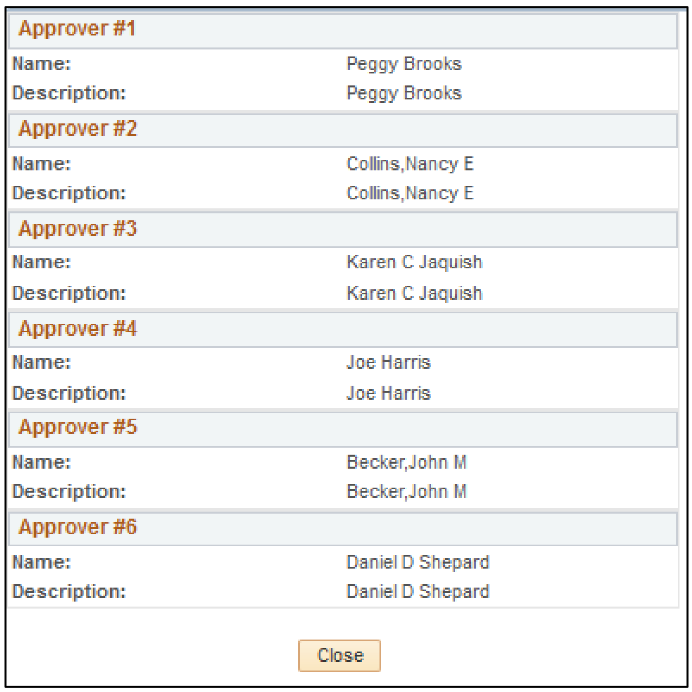


Click on the **View Approval Flow** link to see approval routing:



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



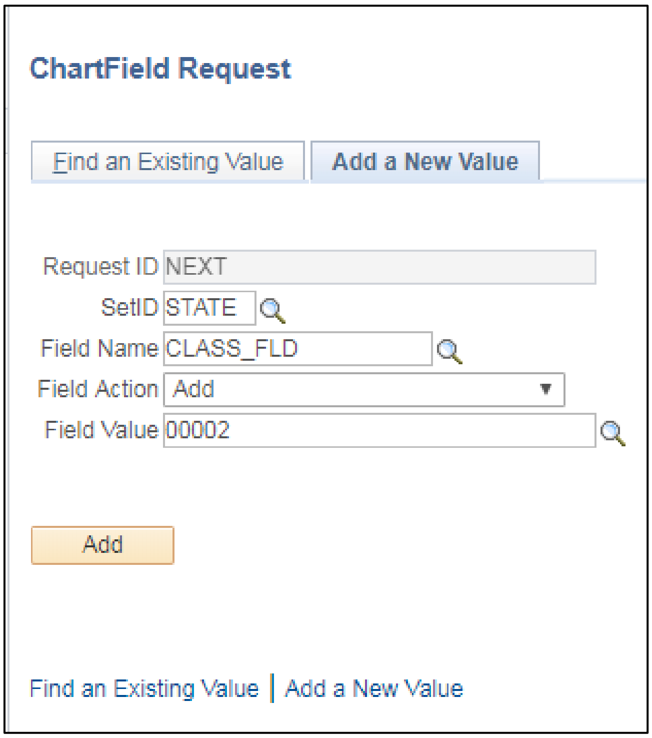


Completing a ChartField Request Form for a Class Code

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:



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

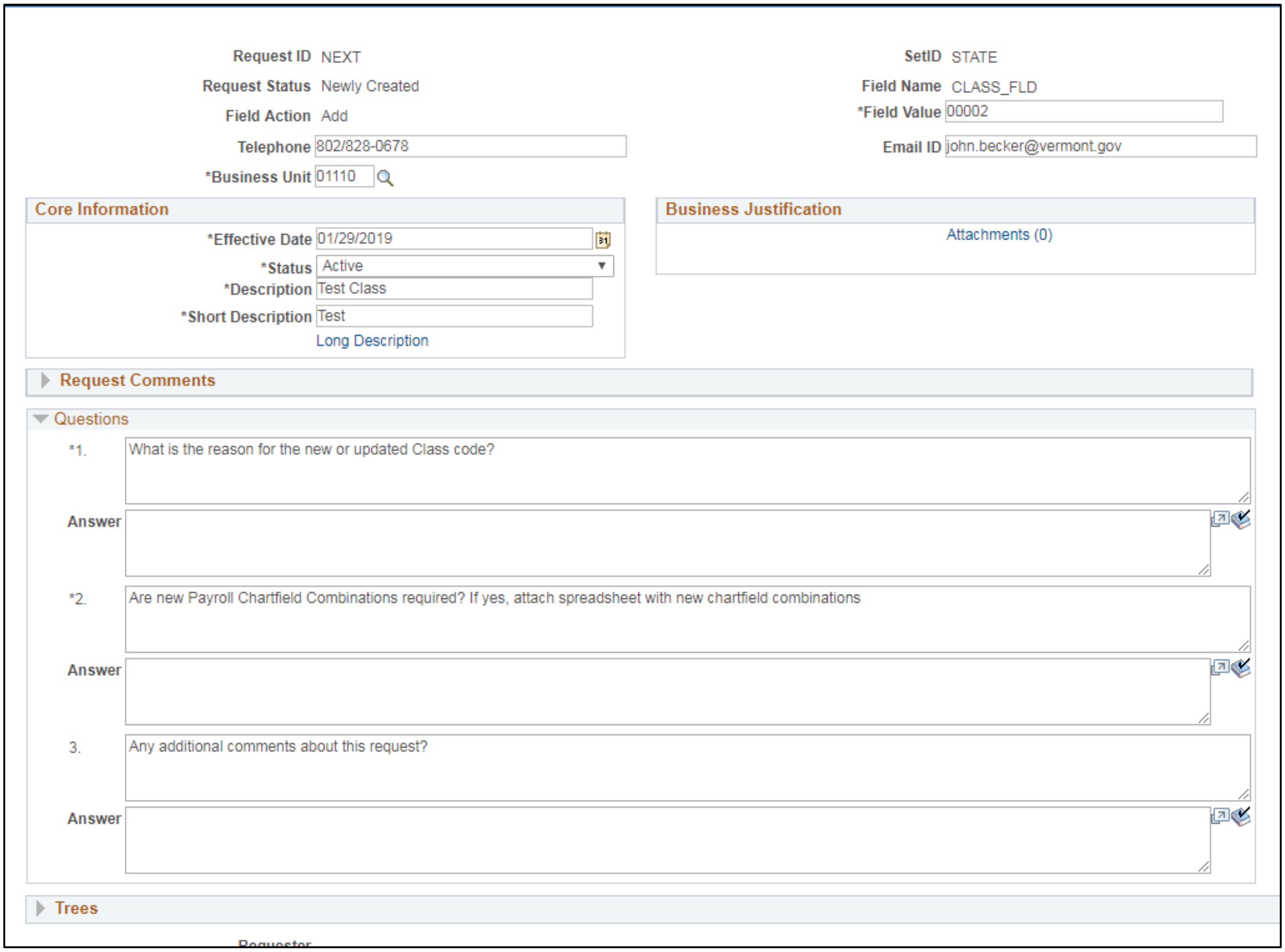
- Options are Add or Update

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:



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)

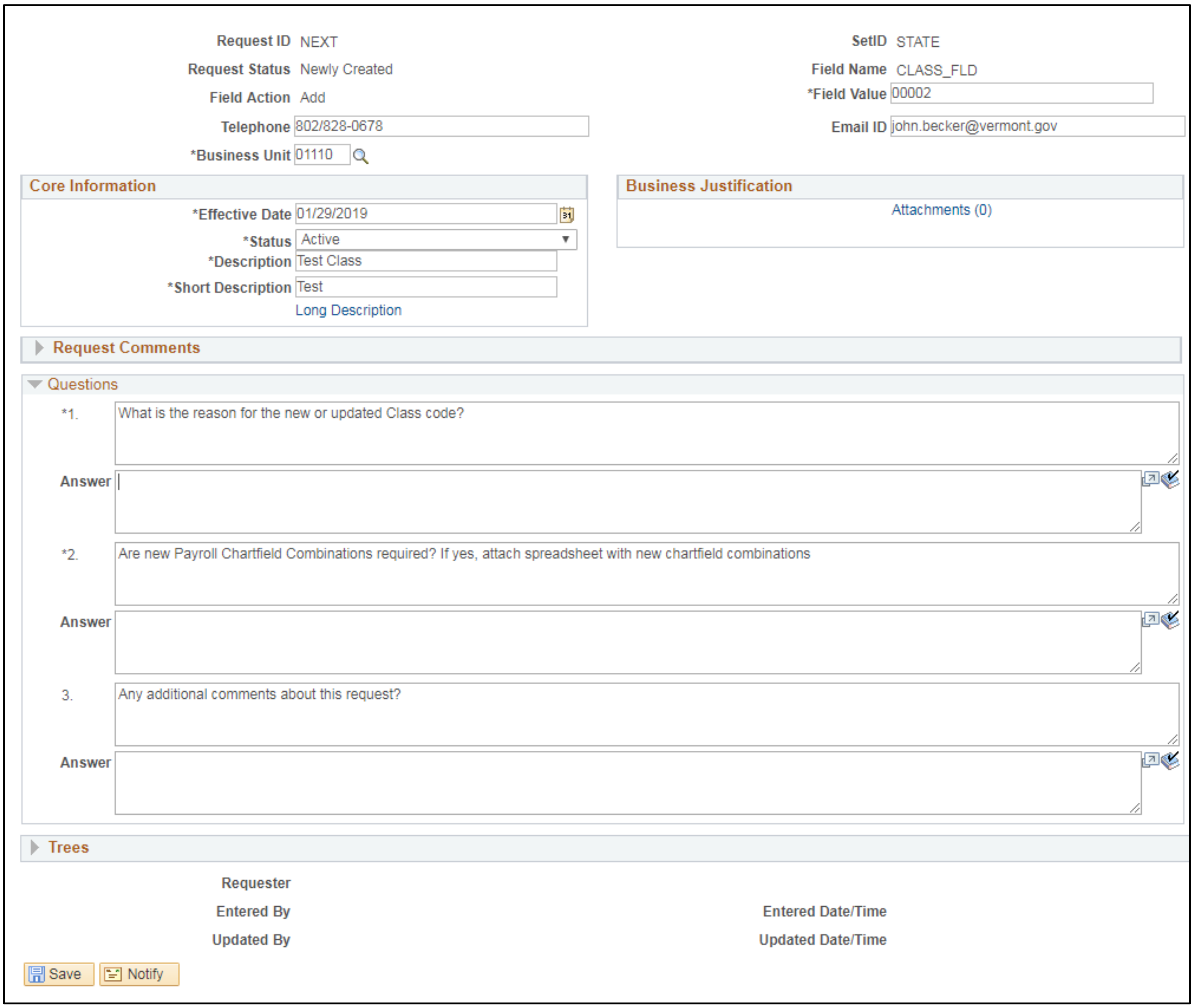
Short Description – Enter a short description (up to 10 characters)

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.

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

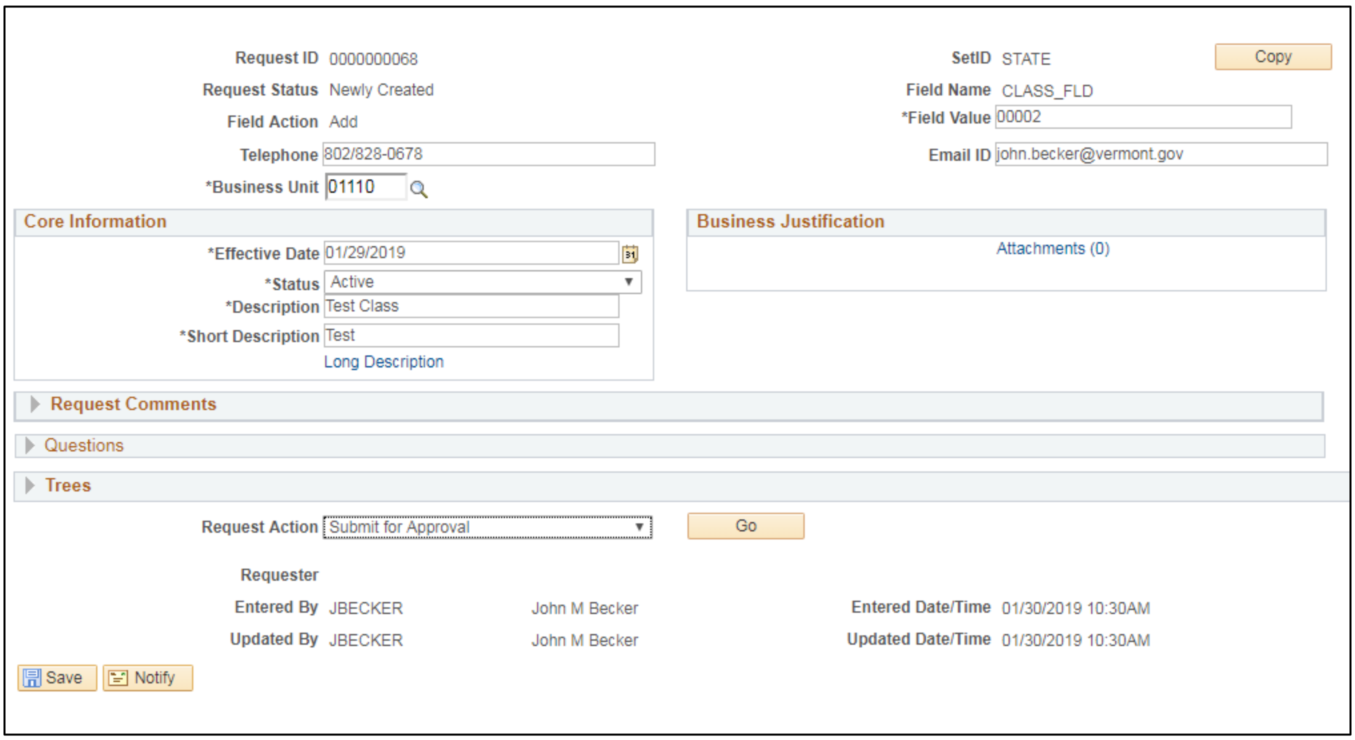
Answer the three questions and click **Save**:



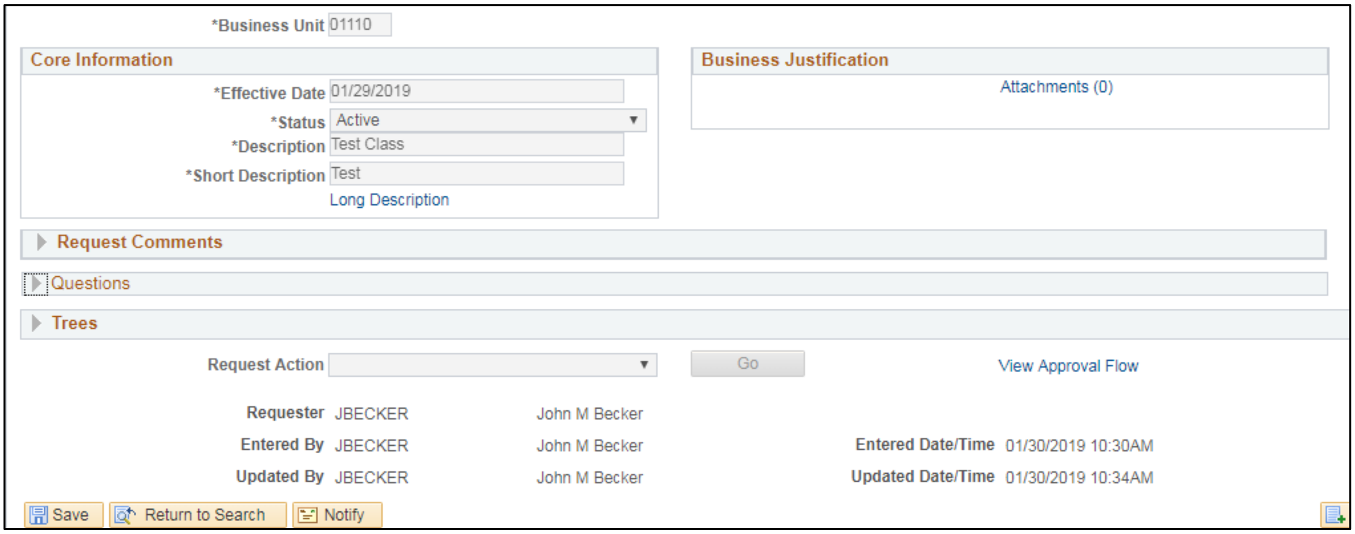
The **Trees** box is only used by VISION Financial Operations, **<u>no entry or selections</u>** should be made under the Trees box

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

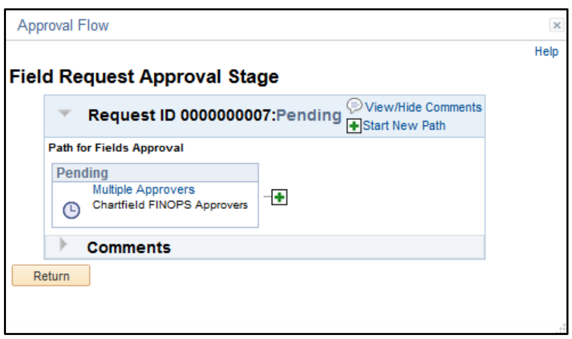
Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:

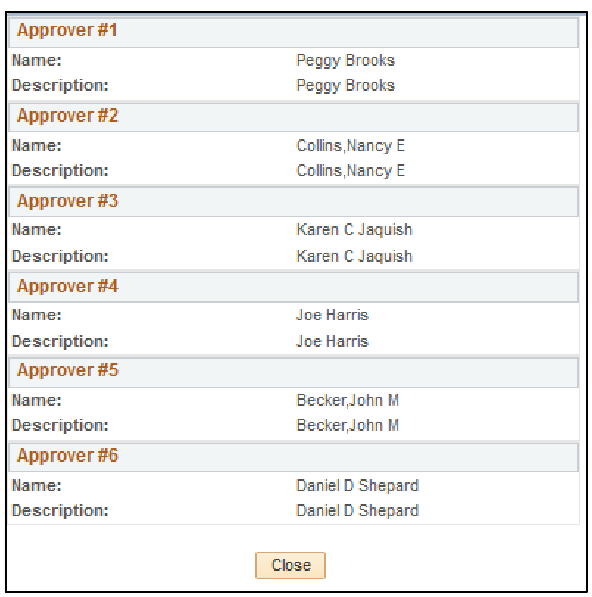


Click on the **View Approval Flow** link to see approval routing:



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



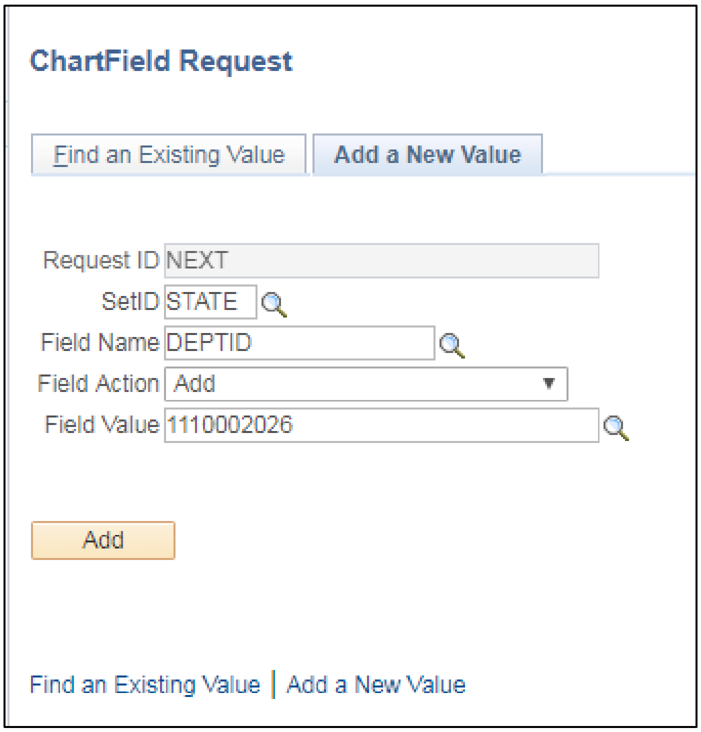


Completing a ChartField Request Form for a Dept ID

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:



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

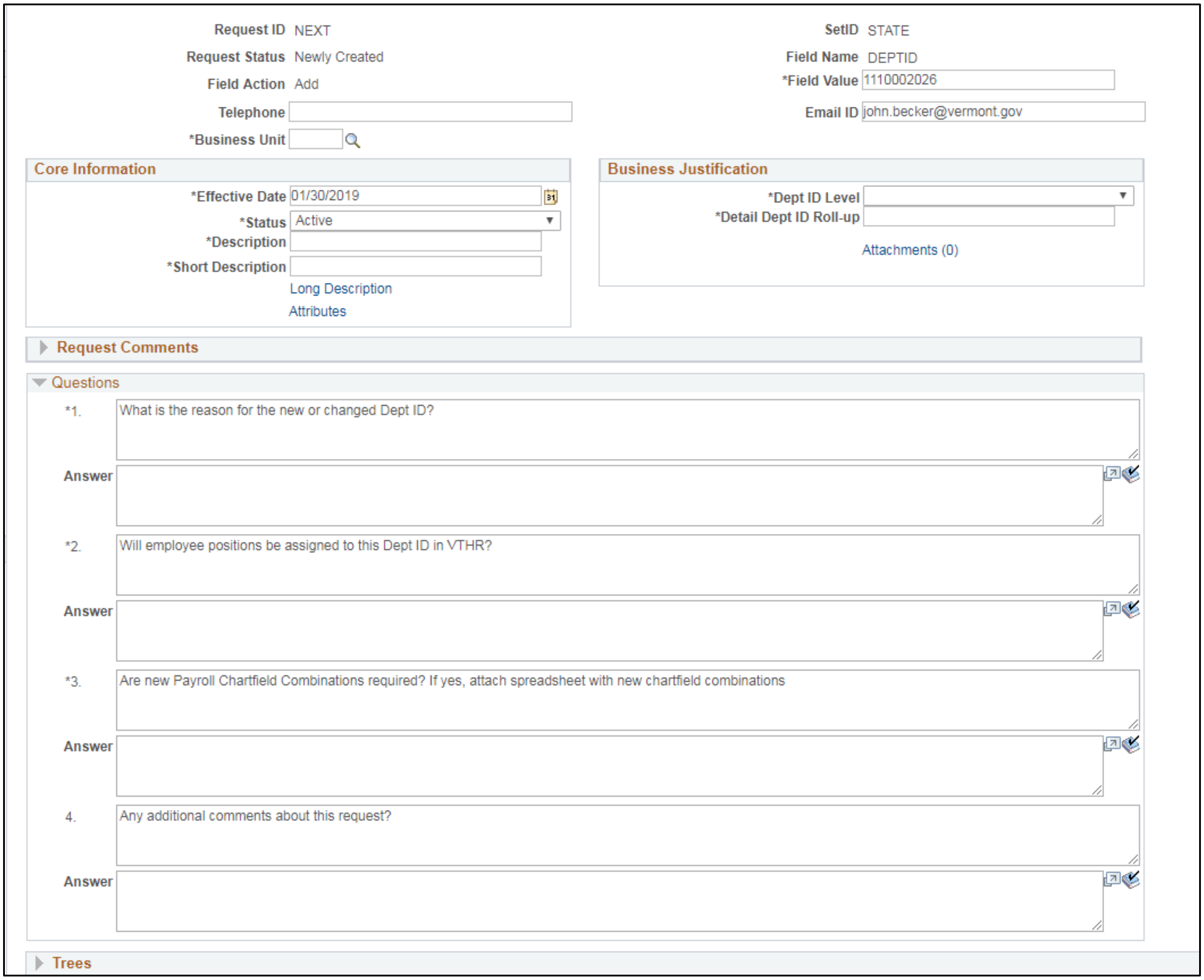
- Options are Add or Update

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:



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)

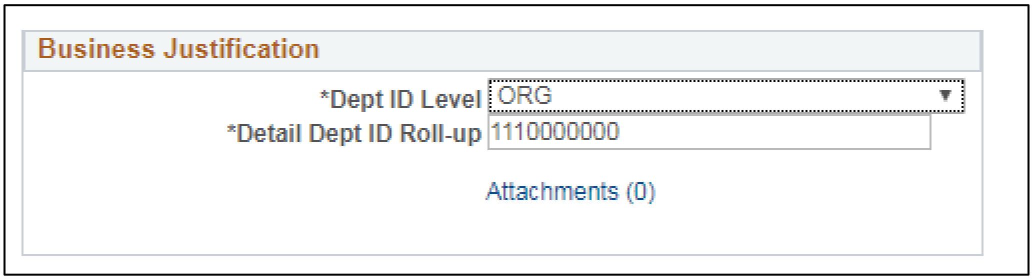
Short Description – Enter a short description (up to 10 characters)

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'

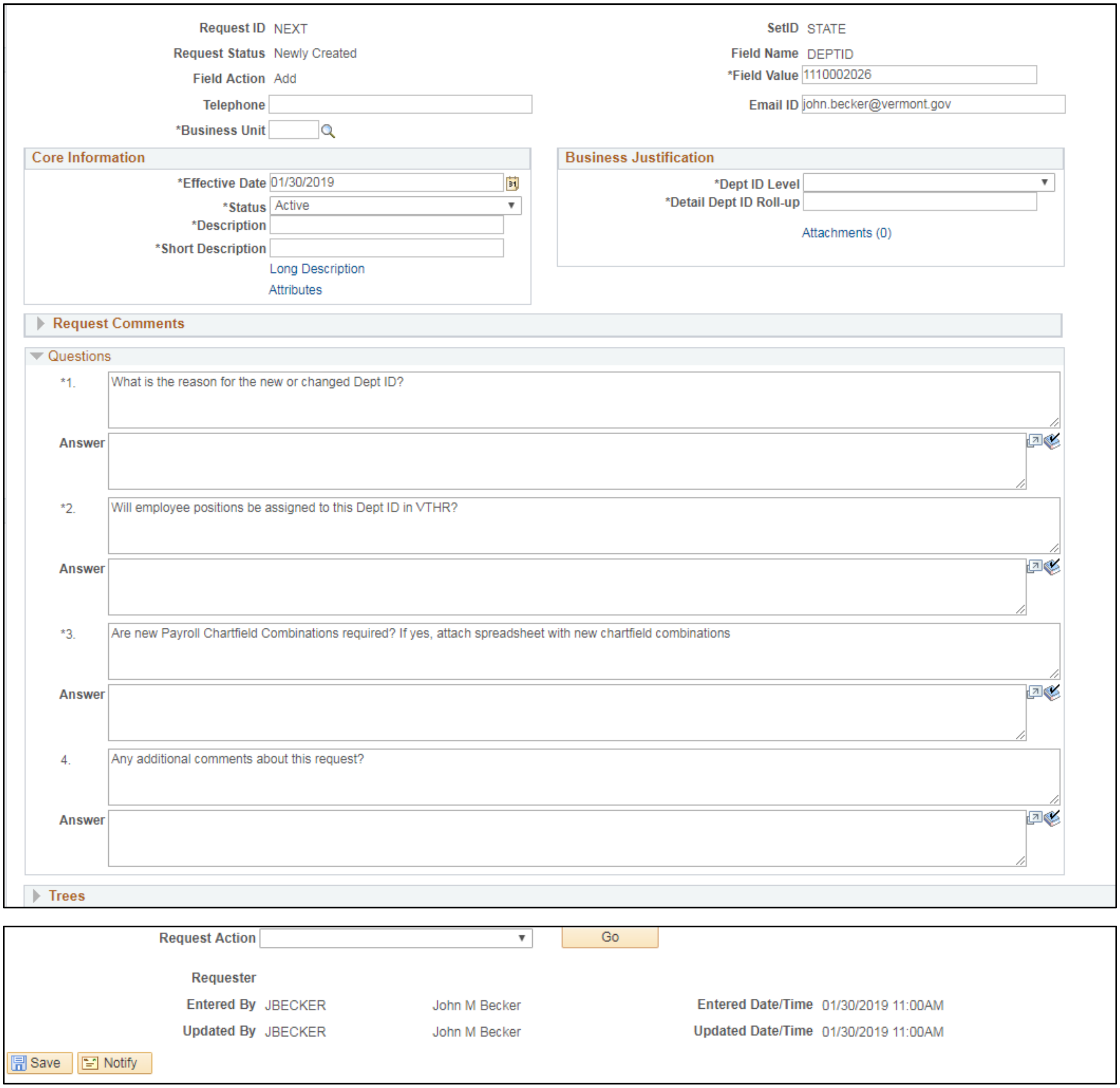
Detail Dept ID Roll-up – Enter the roll-up Dept ID, if "Approp' is selected for the level, the roll-up Dept ID should be the same as the requested Dept ID



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 four questions and click **Save**:


Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone
*Business Unit
SetID STATE
Field Name DEPTID
*Field Value 1110002026
Email ID john.becker@vermont.gov

Core Information
*Effective Date 01/30/2019
*Status Active
*Description
*Short Description
Long Description
Attributes

Business Justification
*Dept ID Level
*Detail Dept ID Roll-up
Attachments (0)

Request Comments

Questions
*1. What is the reason for the new or changed Dept ID?
Answer
*2. Will employee positions be assigned to this Dept ID in 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

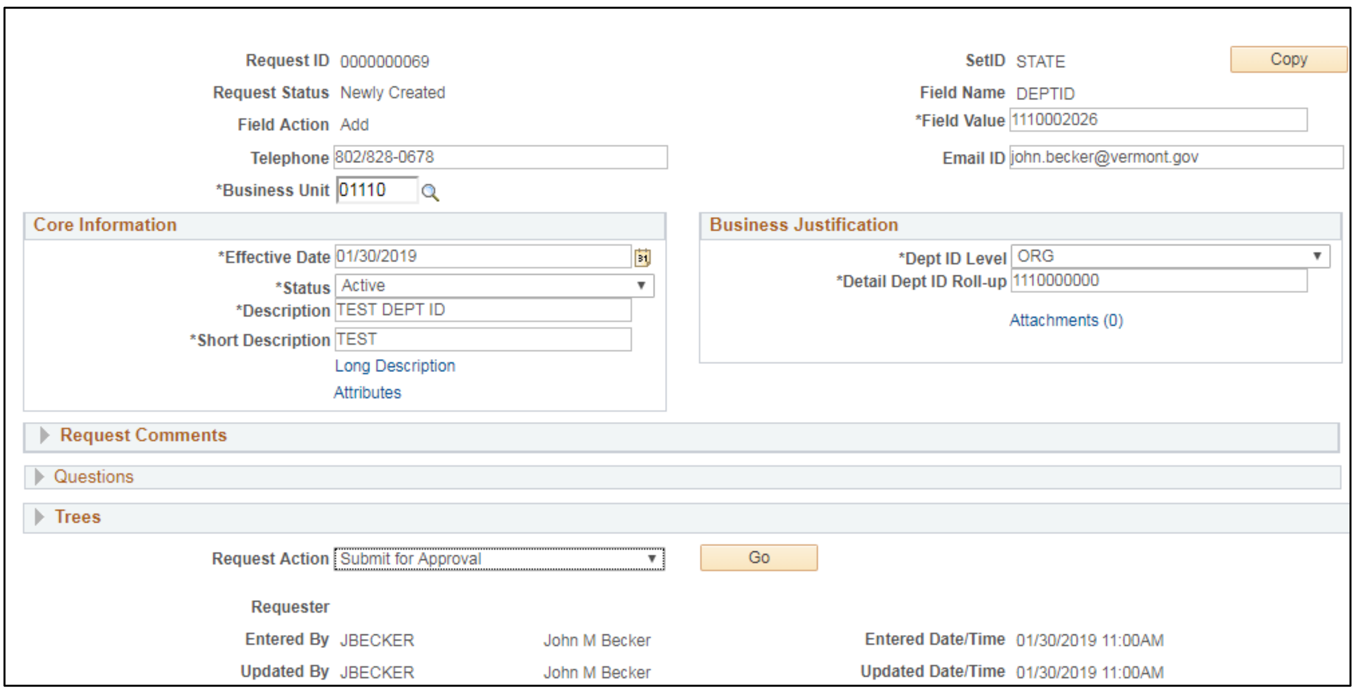
Trees

Request Action
Go
Requester
Entered By JBECKER John M Becker
Entered Date/Time 01/30/2019 11:00AM
Updated By JBECKER John M Becker
Updated Date/Time 01/30/2019 11:00AM
Save
Notify

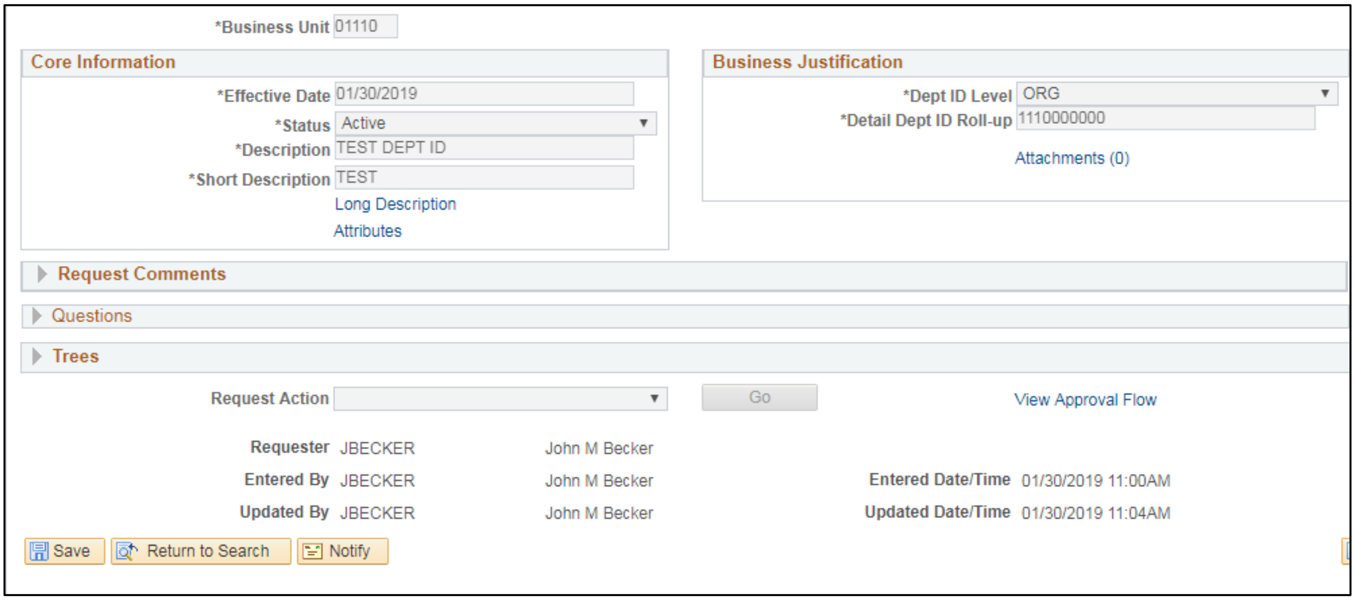
The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

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

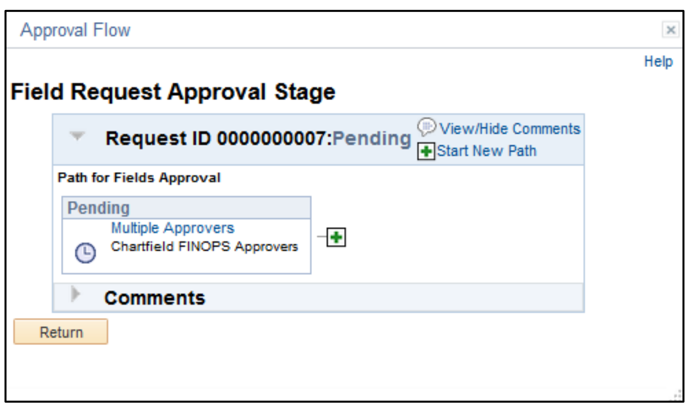
Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:



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



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



Approver #1

Name:	Peggy Brooks
Description:	Peggy Brooks

Approver #2

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

Approver #3

Name:	Karen C Jaquish
Description:	Karen C Jaquish

Approver #4

Name:	Joe Harris
Description:	Joe Harris

Approver #5

Name:	Becker,John M
Description:	Becker,John M

Approver #6

Name:	Daniel D Shepard
Description:	Daniel D Shepard

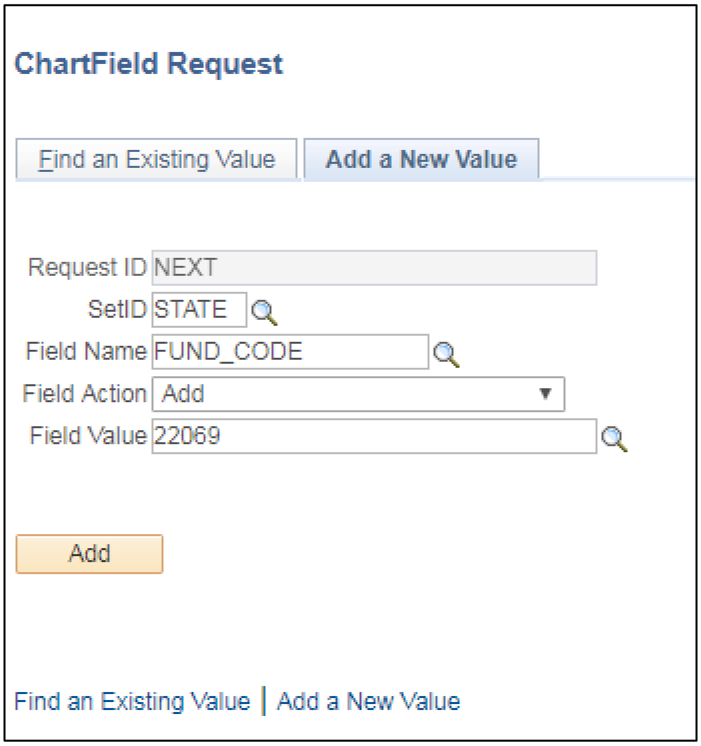
Close

Completing a ChartField Request Form for a Fund Code

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

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or
Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > ChartField Request

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



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

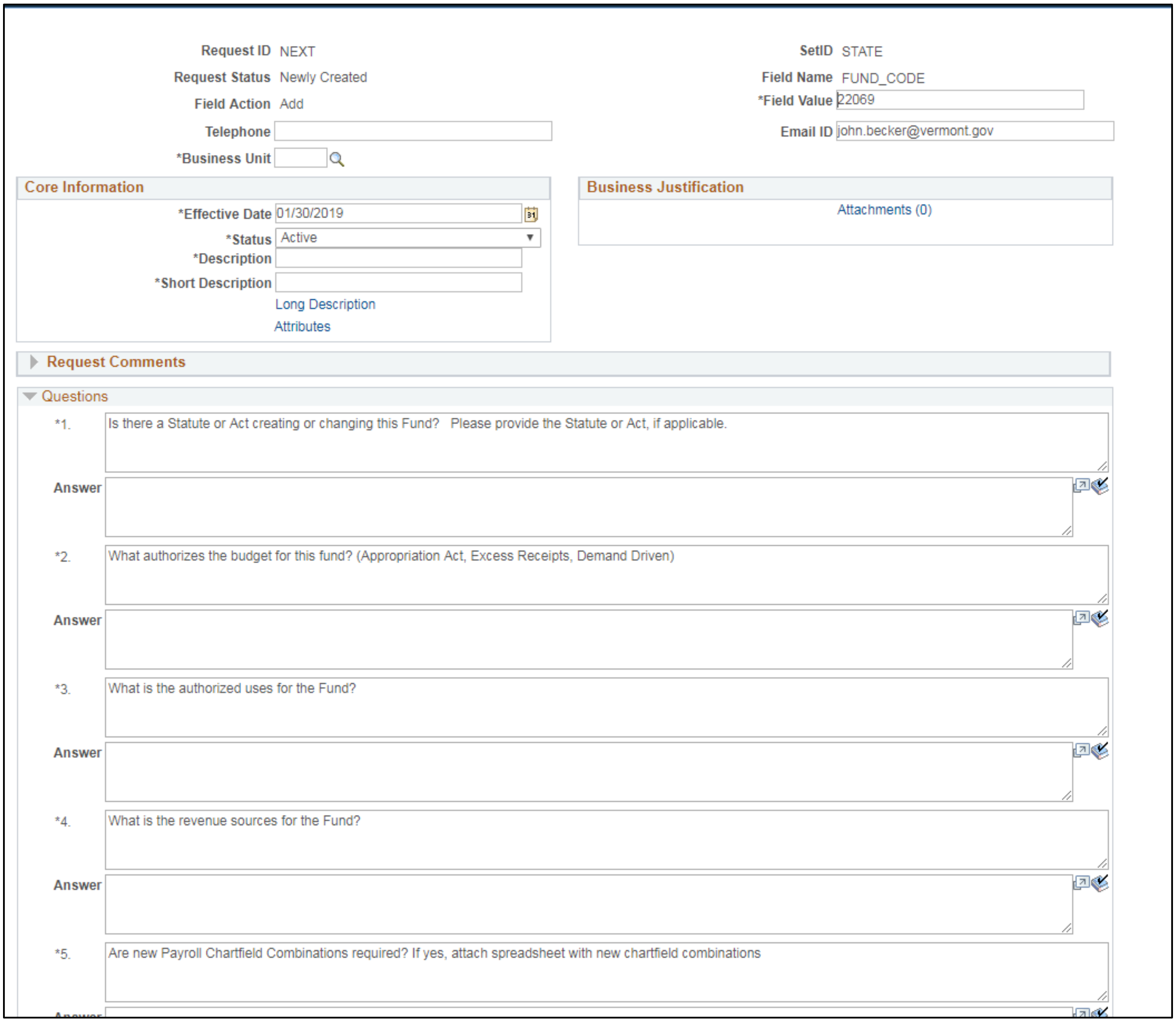
- Options are Add or Update

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
Request Status Newly Created
Field Action Add
Telephone
*Business Unit

SetID STATE
Field Name FUND_CODE
*Field Value 22069
Email ID john.becker@vermont.gov

Core Information
*Effective Date 01/30/2019
*Status Active
*Description
*Short Description
Long Description
Attributes

Business Justification
Attachments (0)

Request Comments

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

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)

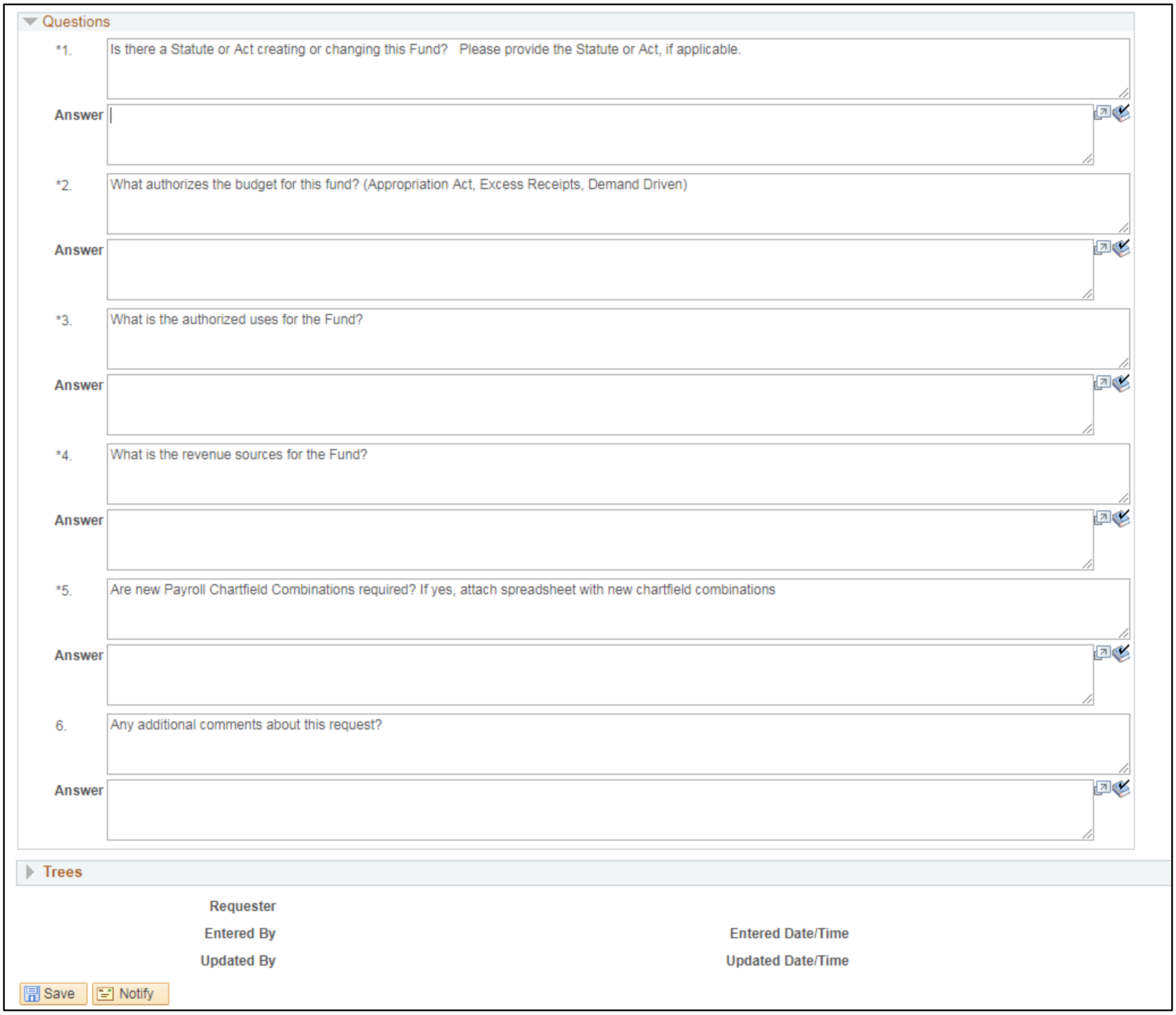
Long Description – Click the **long Description** link – this is an optional field where you can add any additional information about the Fund Code that the requestor believes is important, for example a statute reference, or full name that can’t fit in the Description box due to the limit of 30 characters.

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.

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

*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

6. Any additional comments about this request?

Answer

Trees

Requester

Entered By

Entered Date/Time

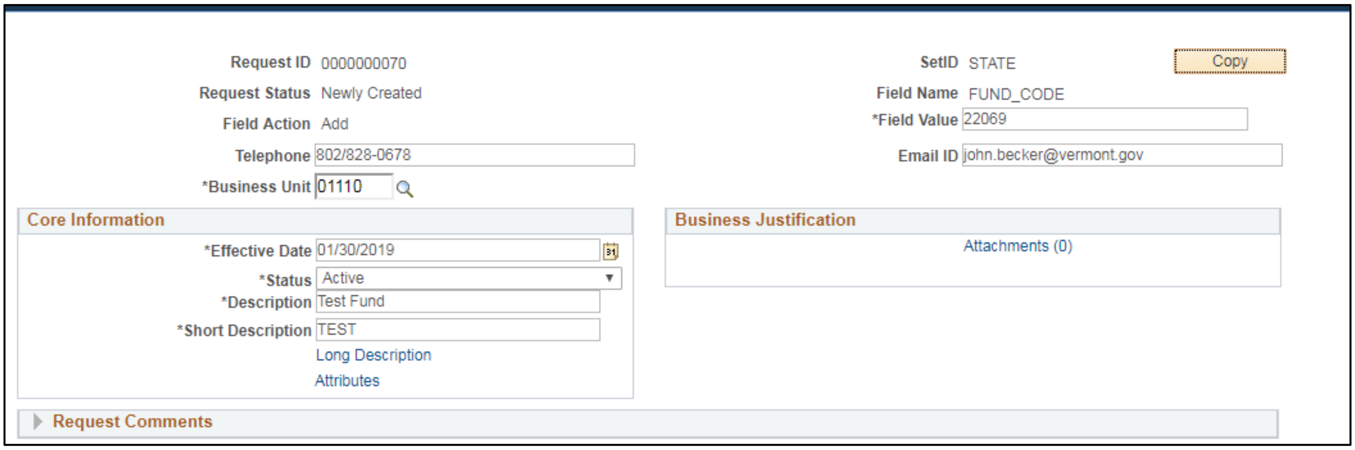
Updated By

Updated Date/Time

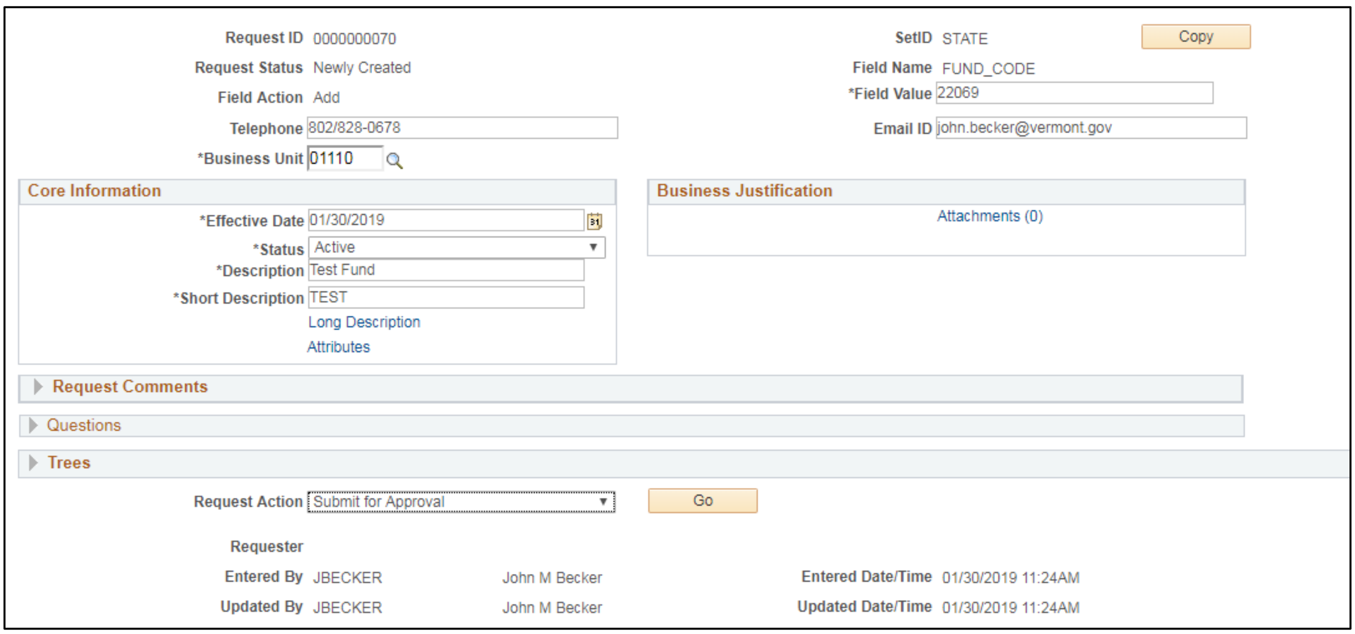
Save Notify

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

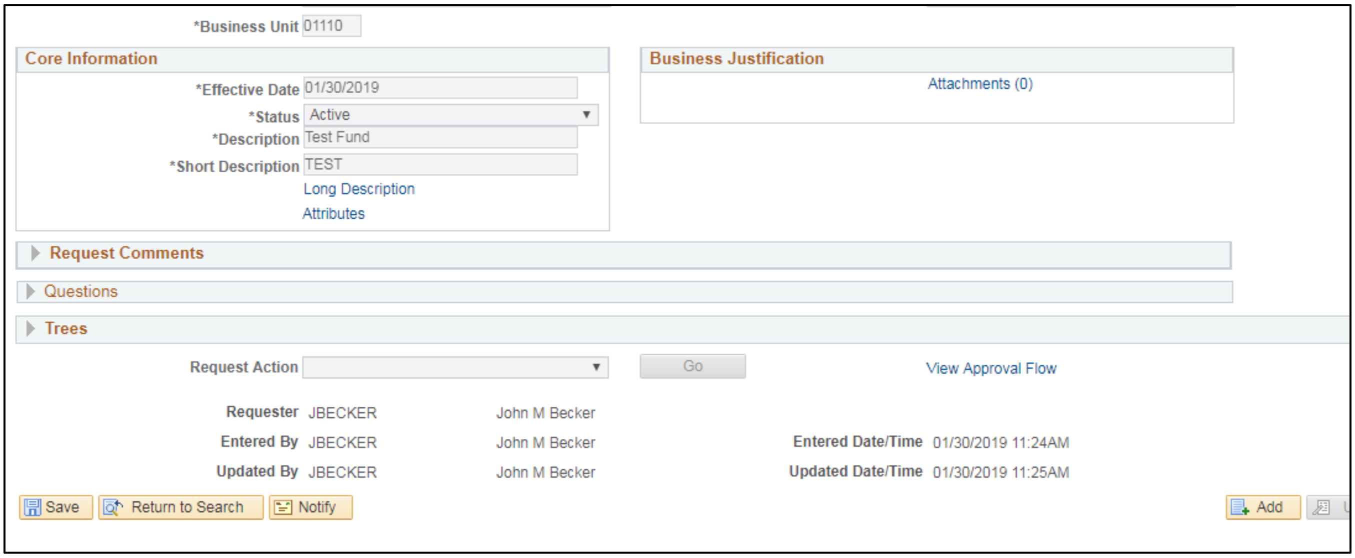
Your request has been assigned a **Request ID** number:



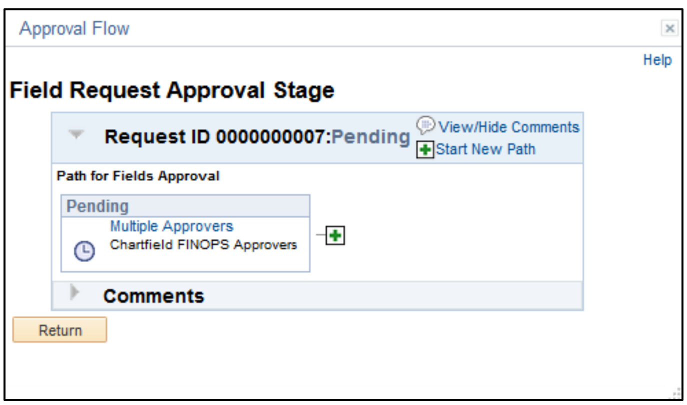
Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:



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



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



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

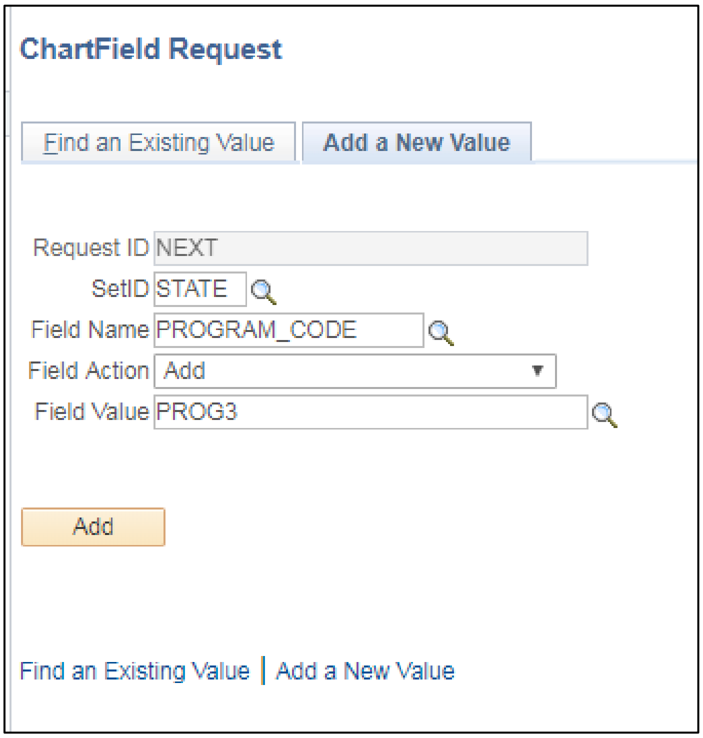
Close

Completing a ChartField Request Form for a 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:



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

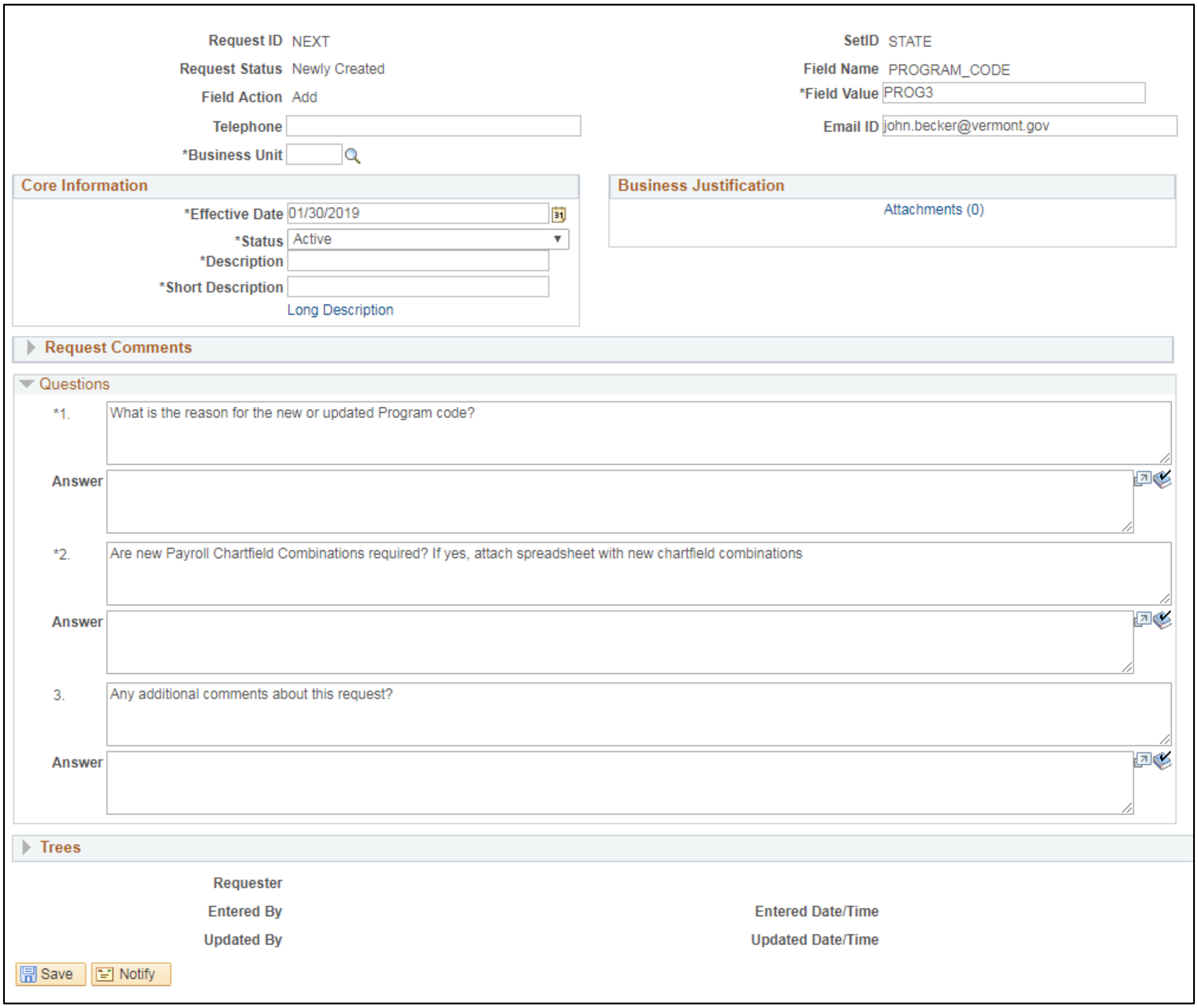
- Options are Add or Update

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:



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.

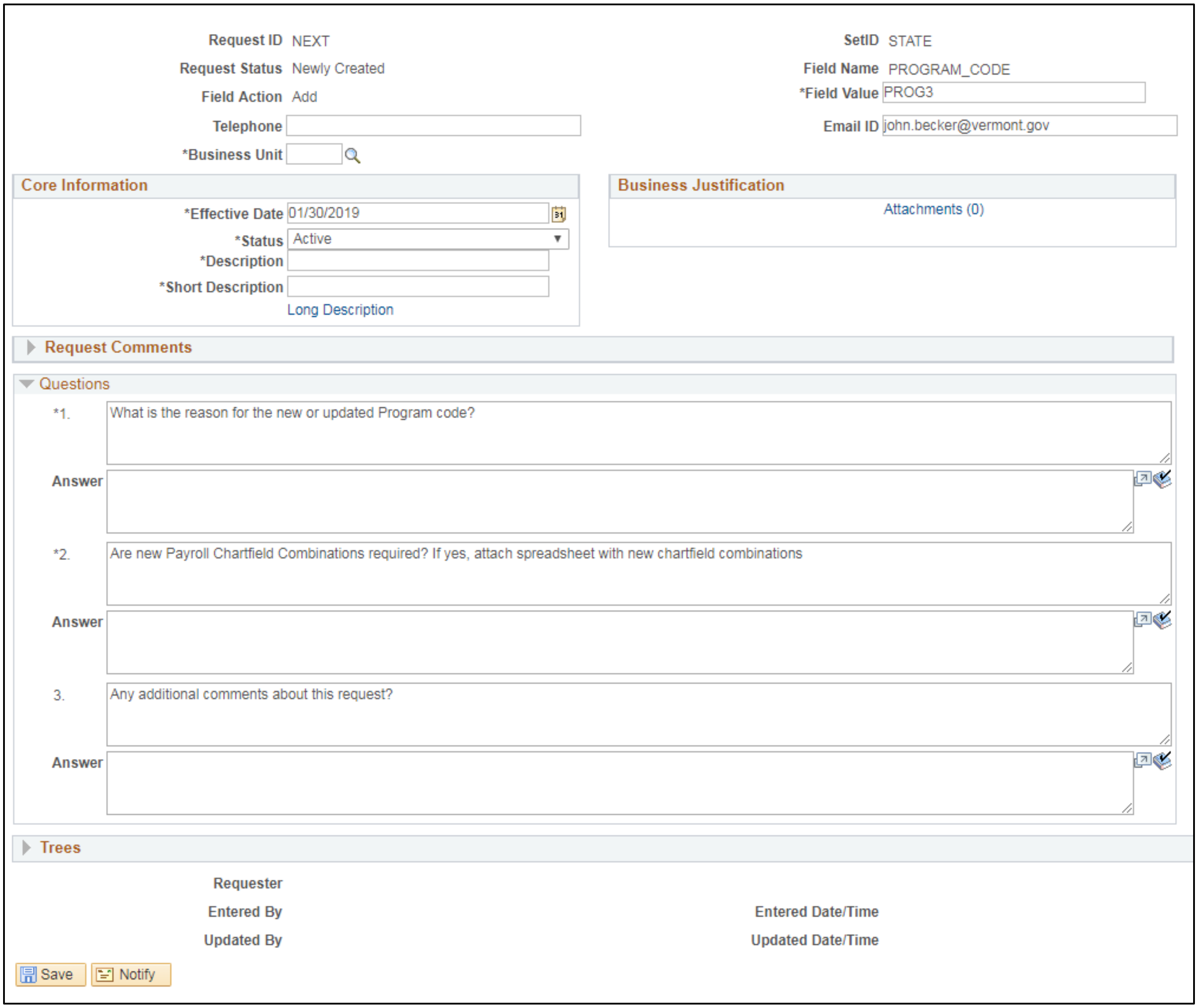
The **Attachments** link - – this is an optional field used to attach relevant files to the request. See exercise on page 41 for instructions on adding an attachment to a chartfield request.

<u>Answer the three questions below</u>:

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.

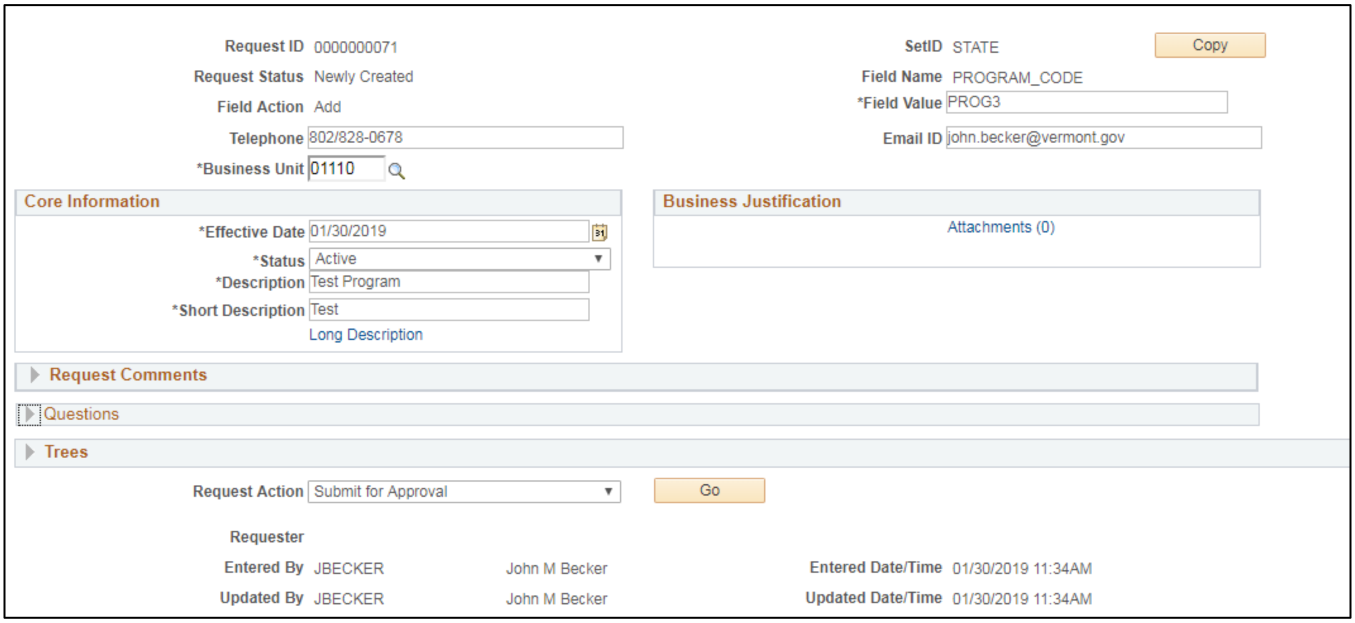
Click **Save**



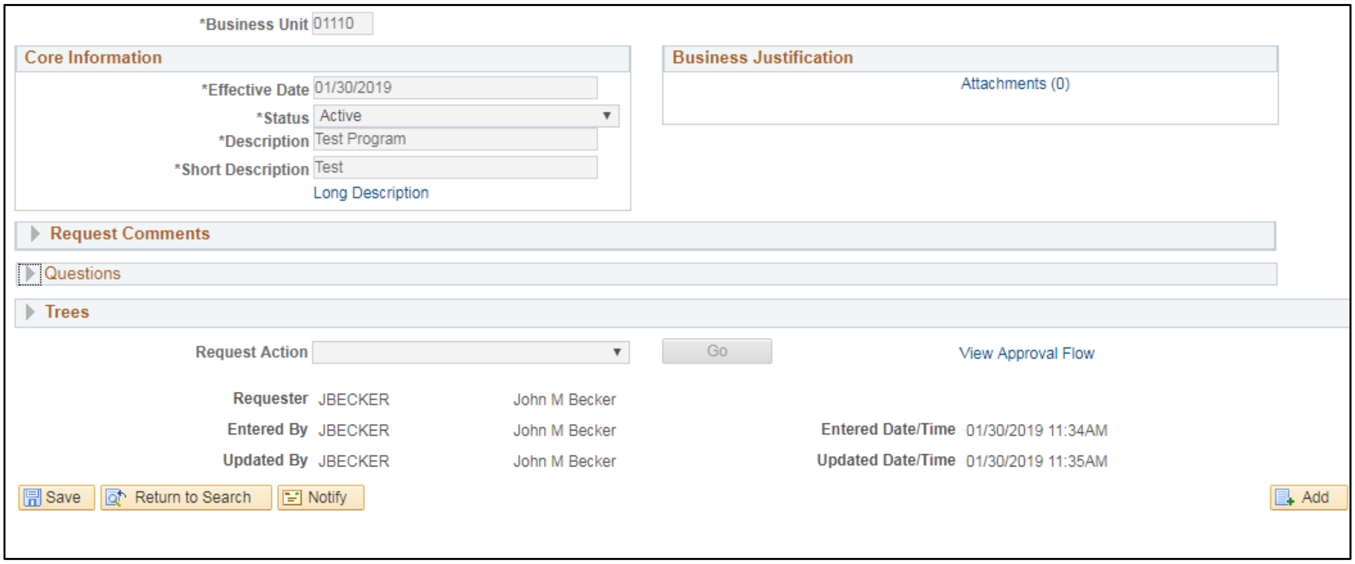
The **Trees** box is only used by VISION Financial Operations, **no entry or selections** should be made under the Trees box

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

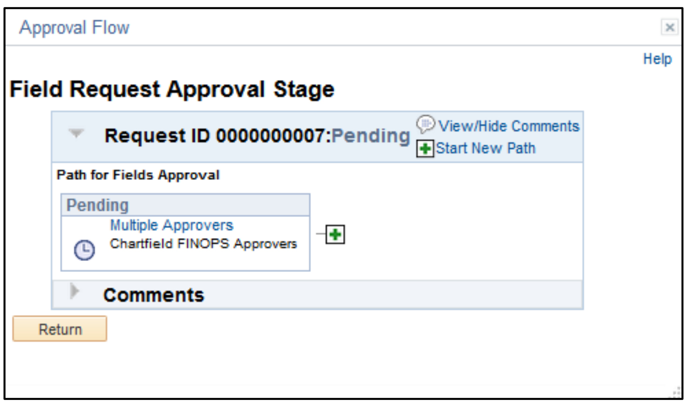
Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:



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



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



Approver #1

Name:	Peggy Brooks
Description:	Peggy Brooks

Approver #2

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

Approver #3

Name:	Karen C Jaquish
Description:	Karen C Jaquish

Approver #4

Name:	Joe Harris
Description:	Joe Harris

Approver #5

Name:	Becker,John M
Description:	Becker,John M

Approver #6

Name:	Daniel D Shepard
Description:	Daniel D Shepard

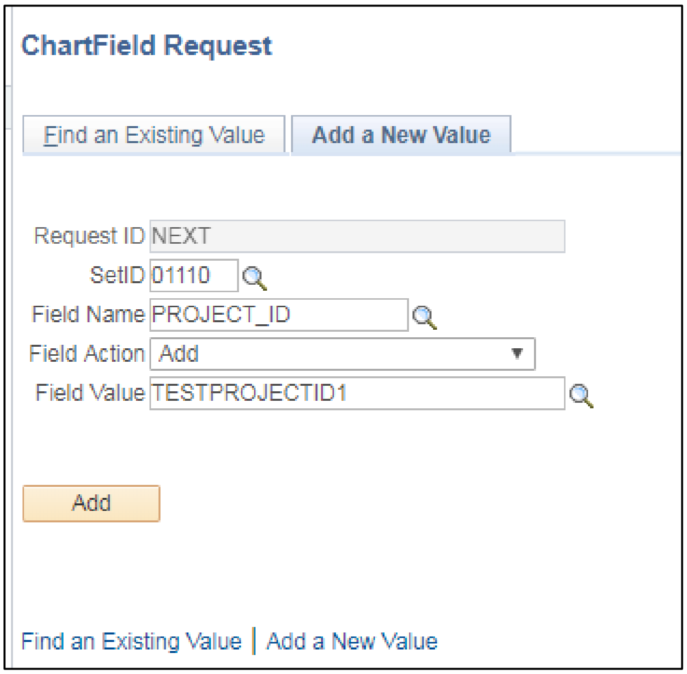
Close

Completing a ChartField Request Form for a Project ID

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

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or
Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > ChartField Request

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



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

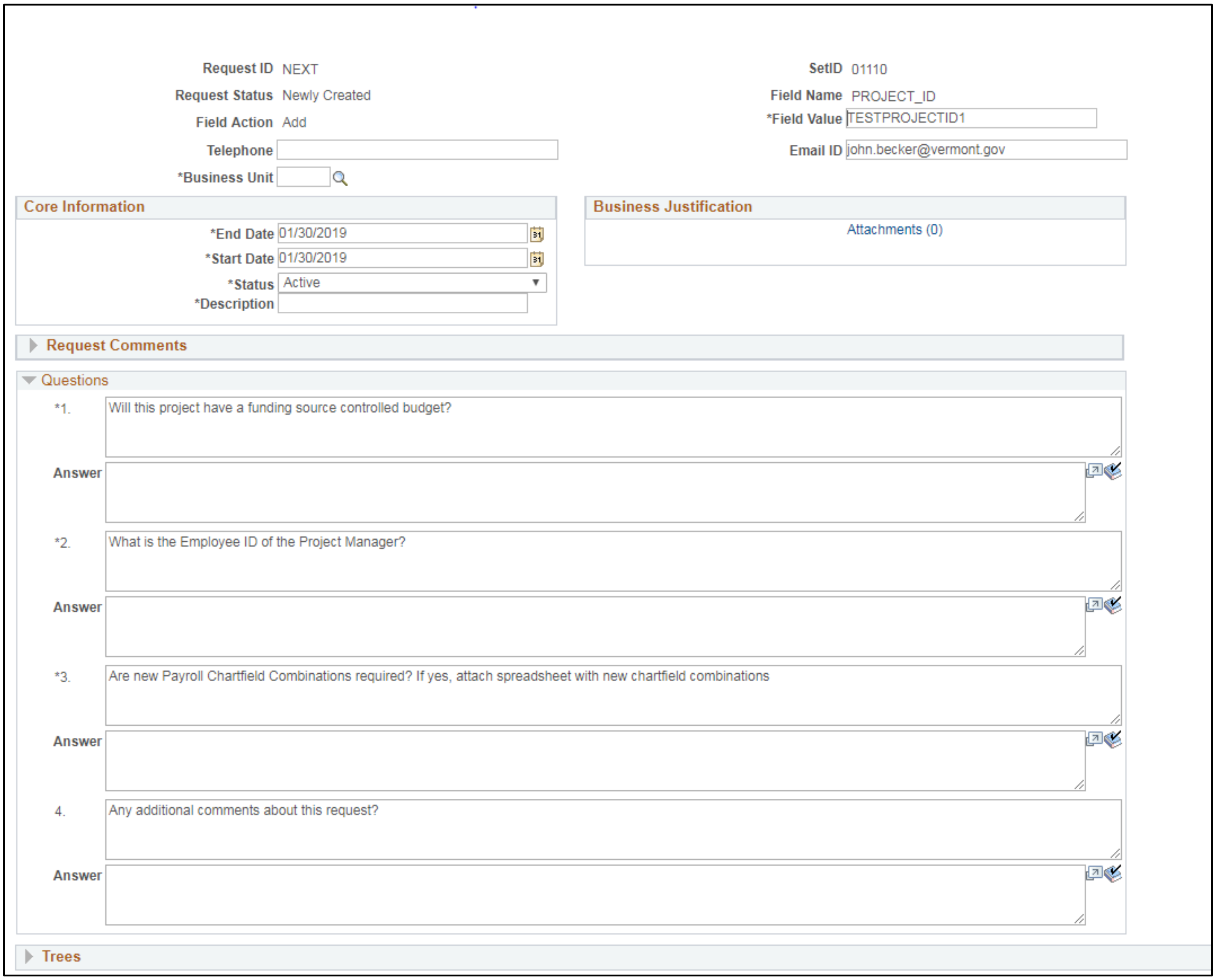
- Options are Add or Update

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:



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

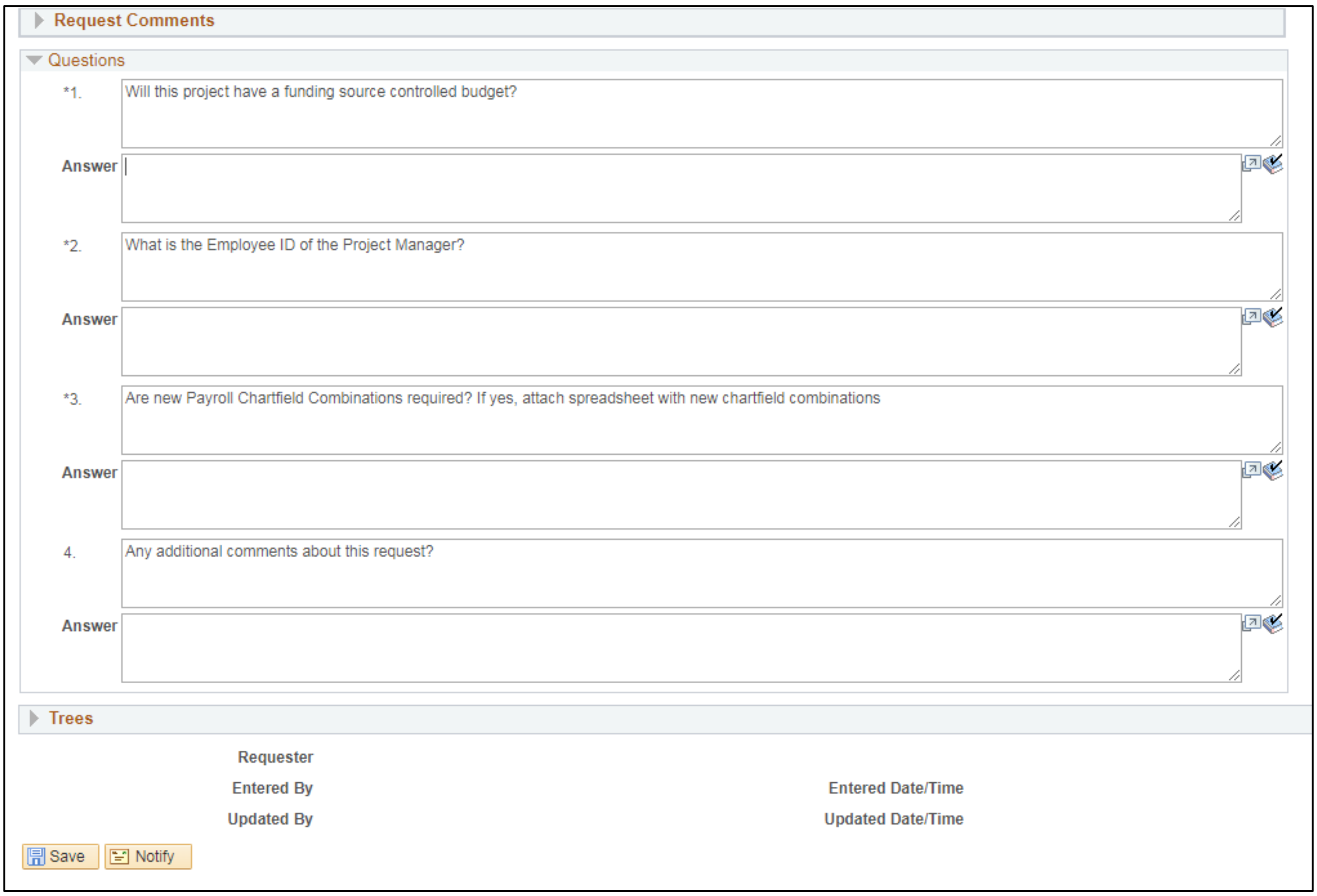
Status – Select 'Active' or 'Inactive' as appropriate

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.

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

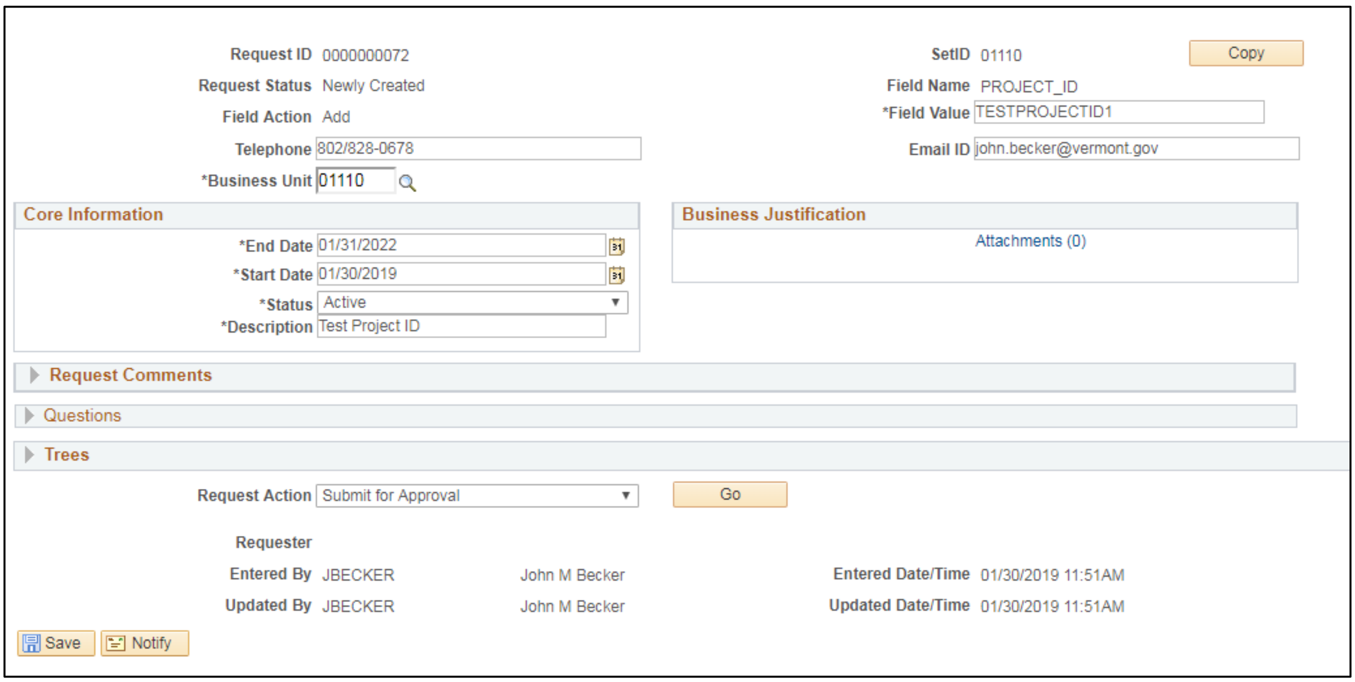
Answer the four questions and click **Save**:



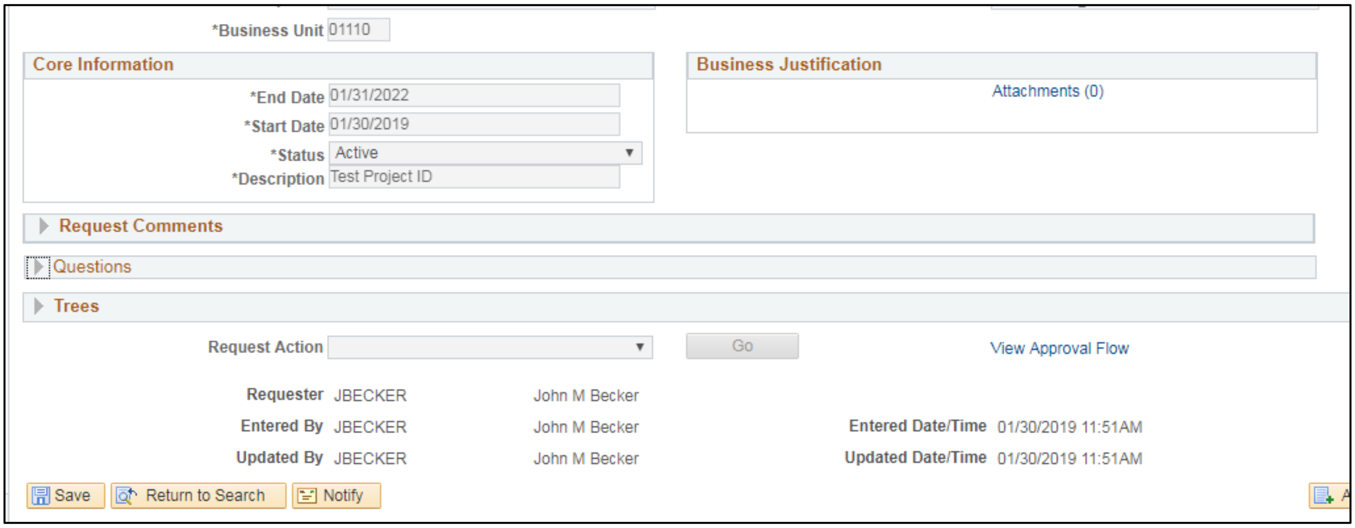
The **Trees** box is only used by VISION Financial Operations, <u>**no entry or selections**</u> should be made under the Trees box

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

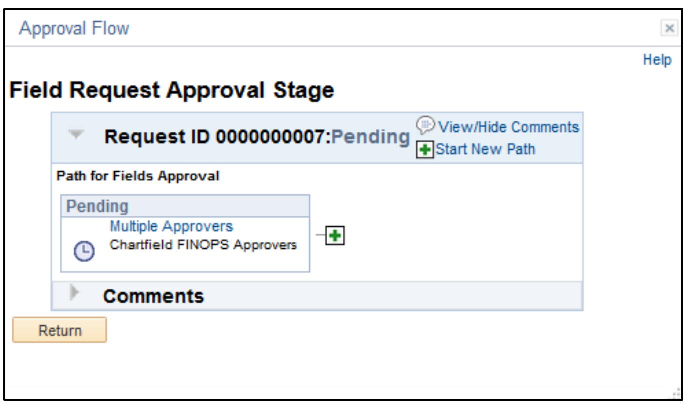
Select **Submit for Approval** from the **Request Action** drop-down menu and click **Go**:



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



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



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

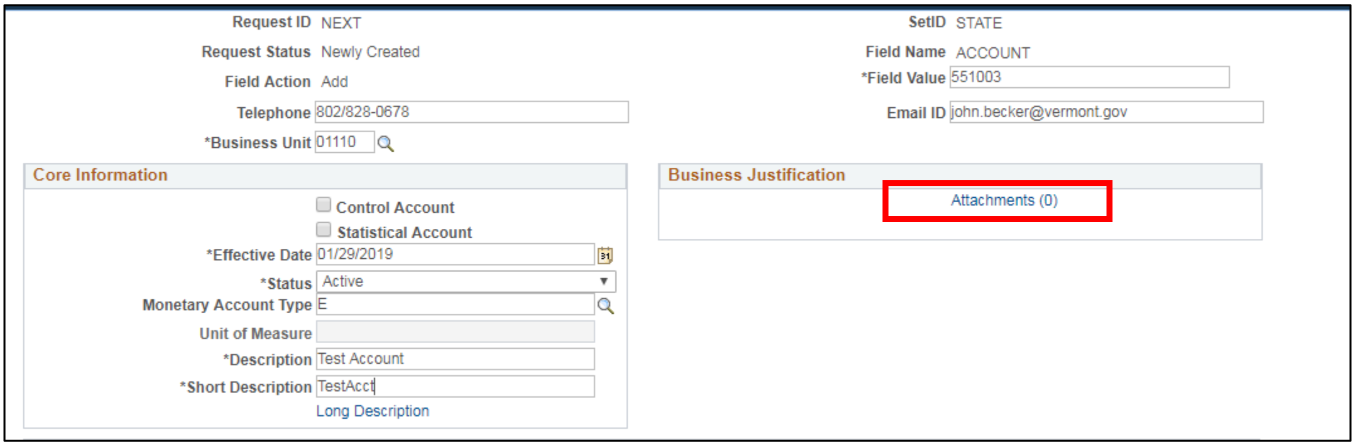
Name:	Daniel D Shepard
Description:	Daniel D Shepard

Close

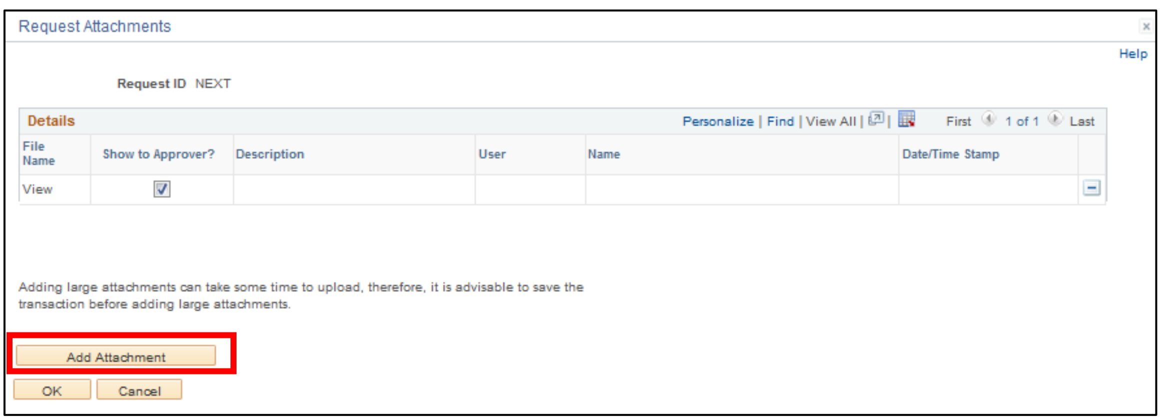
Adding an Attachment to a ChartField Request

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

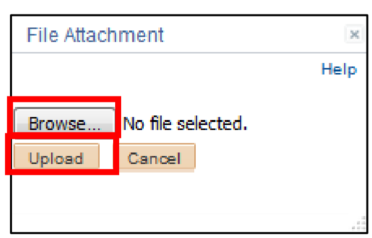
Click the **Attachments** link - – this is an optional field used to attach relevant files to the request.



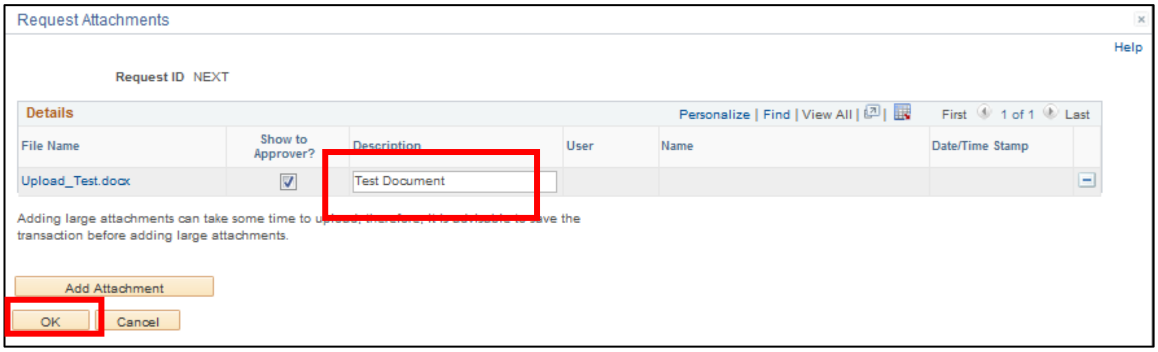
The **Request Attachments** page opens, Click the **Add Attachment** button:



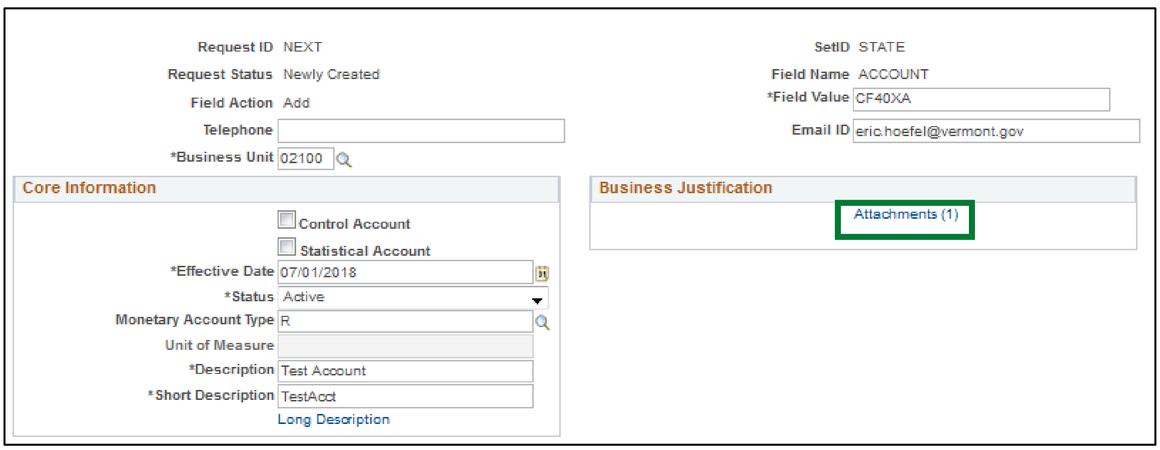
Click **Browse**, select your document and click **Upload:**



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



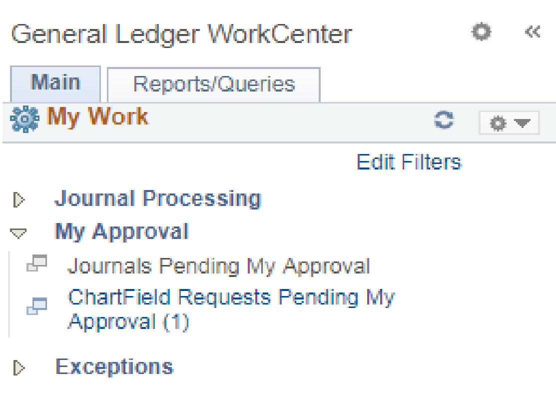
The **Attachment** counter now shows 1 attachment:



Department Level Approval of a ChartField Request Form

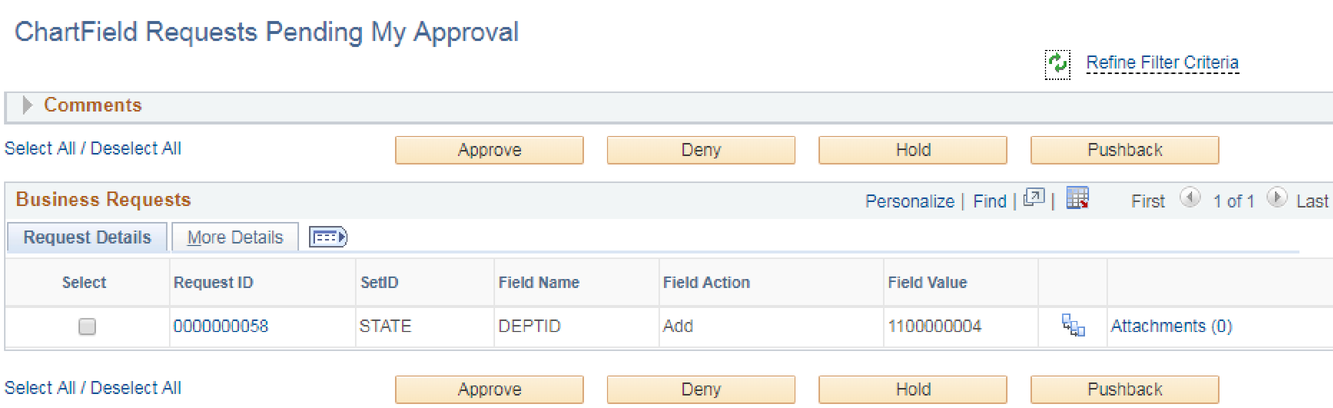
Situations where this is used: If a department has requested to have users set up in VISION as department level approvers, after a Chartfield Request Form is submitted by the requestor, VISION workflow routes it to a designated department Approver or a group of designated Approvers for review and approval.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

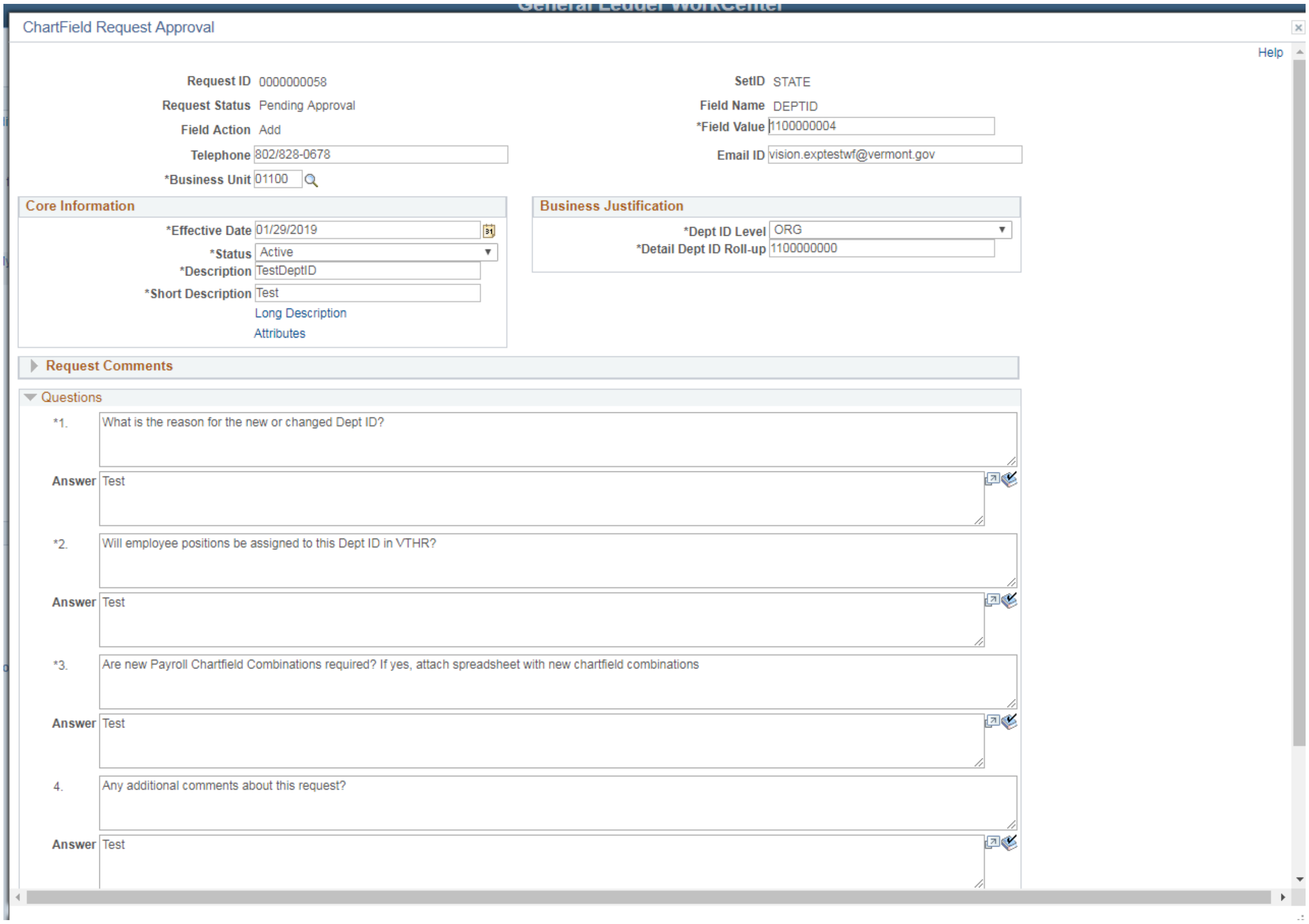


If there is a number after the Chartfield Requests Pending My Approval, that means there are requests to be processed.

Click on link to review the Chartfield request



Click on the Request ID link to review the request Page



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.

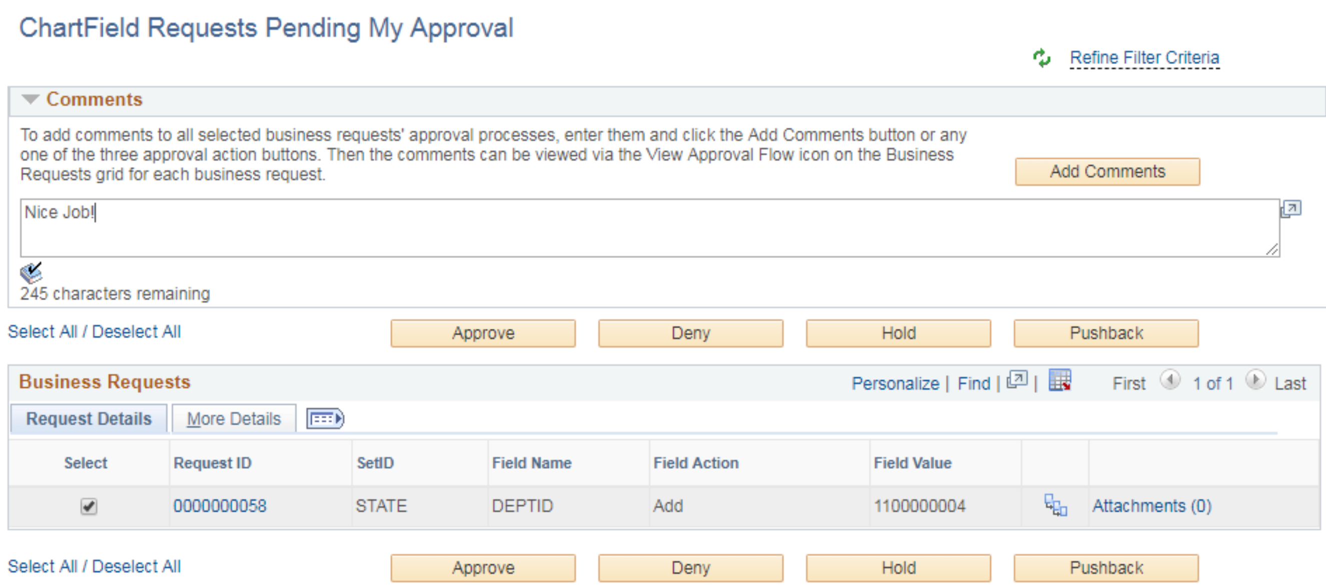
2. If you have determined the request needs to be sent back to the requestor for additional information, you can deny the request.

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.

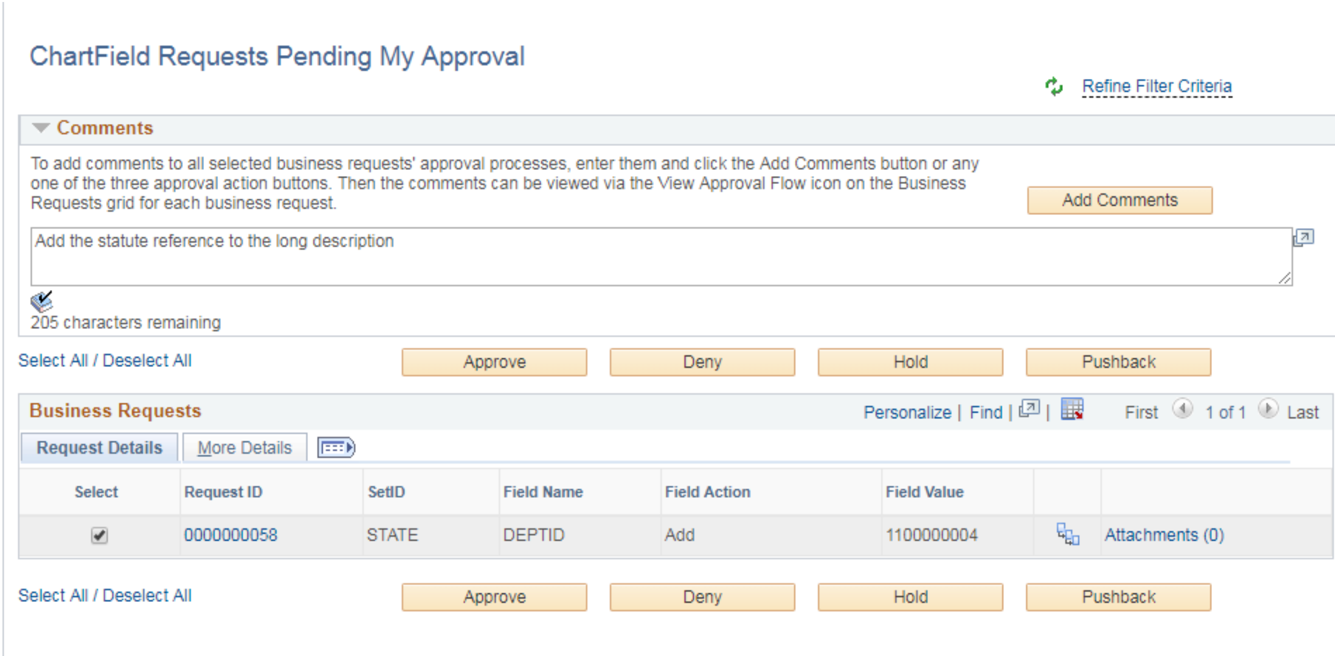


The request is now routed to Finance and Management for final approval to be added to VISION.

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

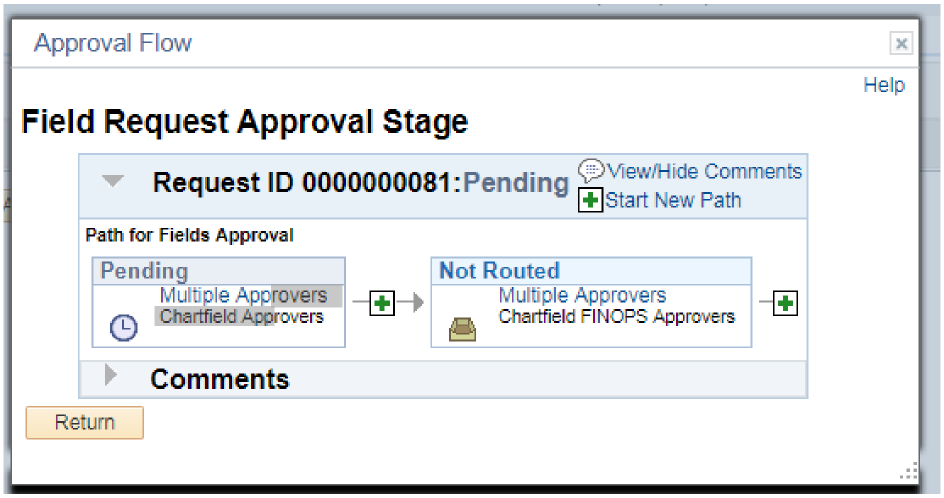


The request is now routed back to the requestor, where they can rework and resubmit it for approval or they can decide to cancel it.

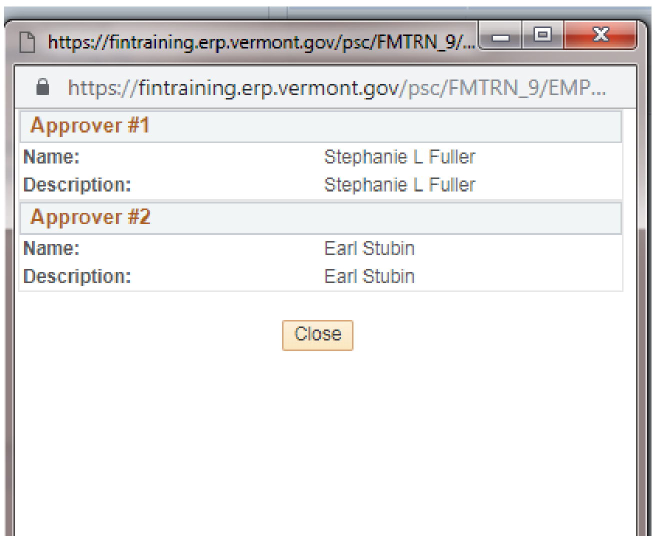
To view Workflow

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

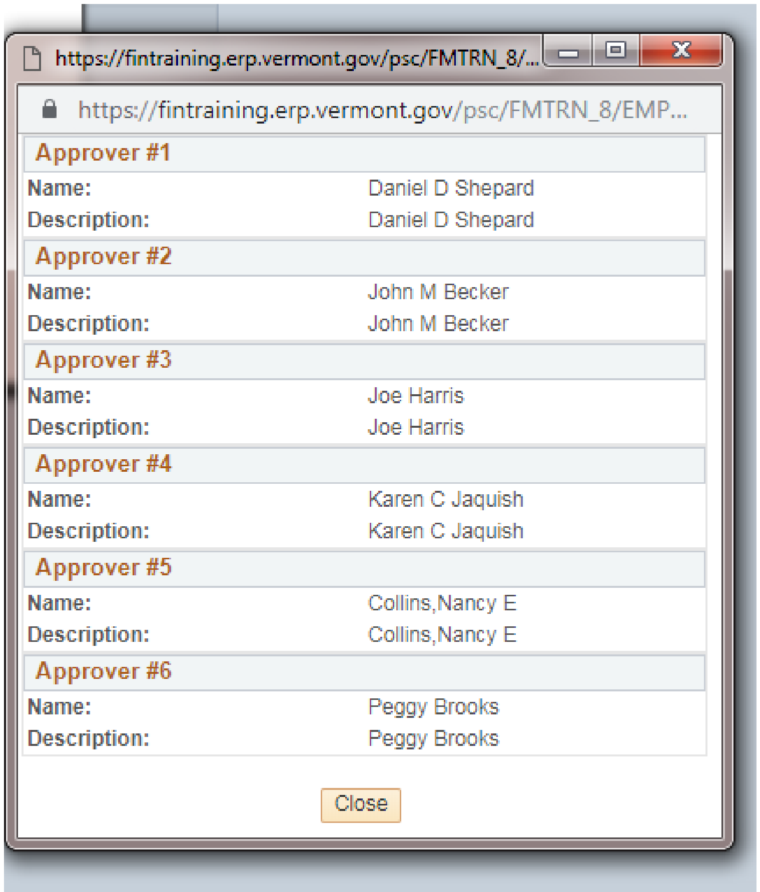
The **Approval Flow** box opens, this shows the two levels of approval



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



Under the Not Routed box click the **Multiple Approvers** link to see who can approve the request after its approved by the department approvers.

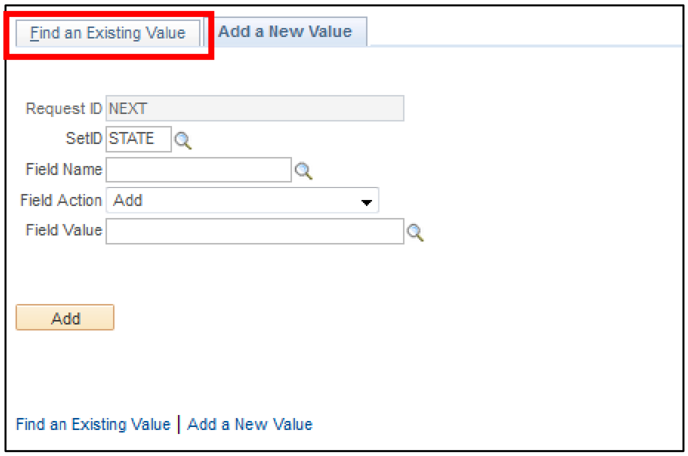

https://fintraining.erp.vermont.gov/psc/FMTRN_8/...
https://fintraining.erp.vermont.gov/psc/FMTRN_8/EMP...
Approver #1
Name: Daniel D Shepard
Description: Daniel D Shepard
Approver #2
Name: John M Becker
Description: John M Becker
Approver #3
Name: Joe Harris
Description: Joe Harris
Approver #4
Name: Karen C Jaquish
Description: Karen C Jaquish
Approver #5
Name: Collins,Nancy E
Description: Collins,Nancy E
Approver #6
Name: Peggy Brooks
Description: Peggy Brooks
Close

Tracking a ChartField Request Status

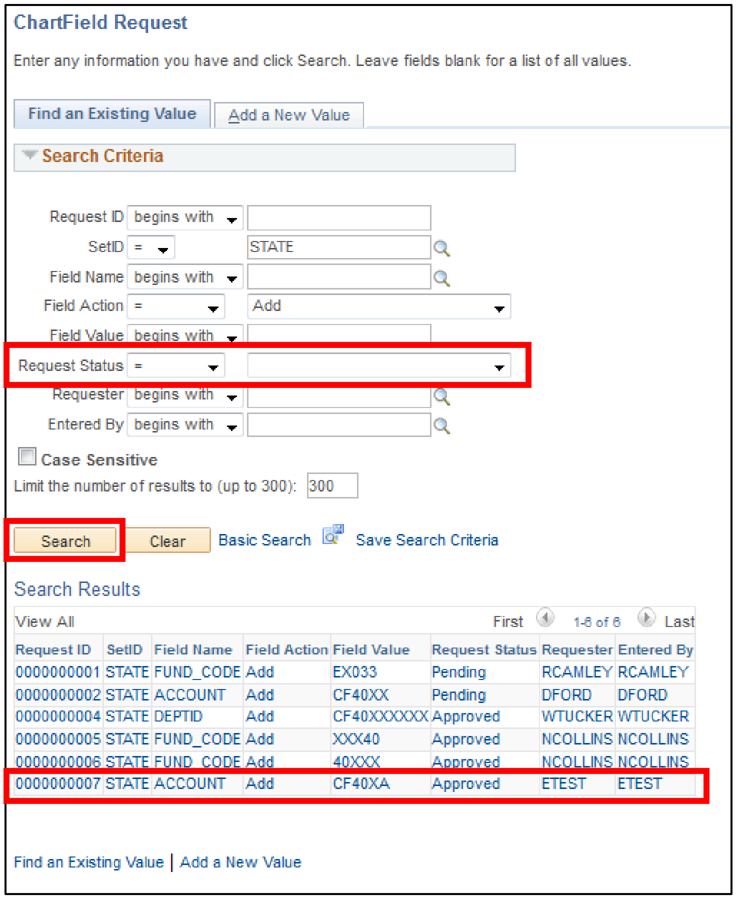
When to use: To track the status of a chartfield request form you submitted

WorkCenter navigation: General Ledger WorkCenter > Links pagelet > Chartfields > ChartField Request
or
Navigator Menu navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > ChartField Request

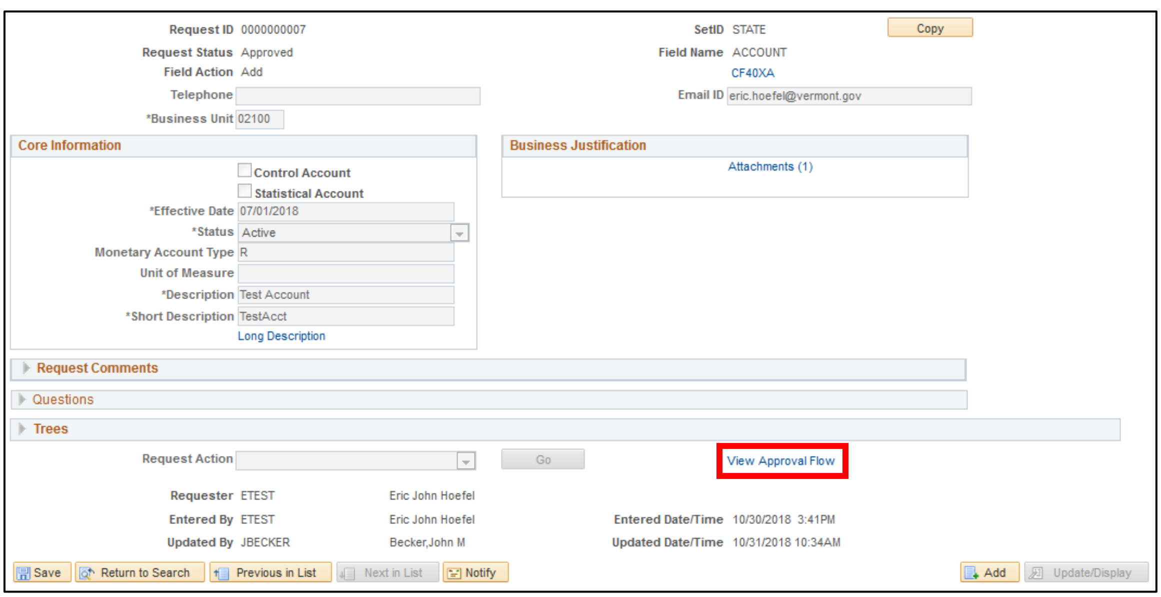
The **Add a New Value** page opens, click the **Find an Existing Value** tab:



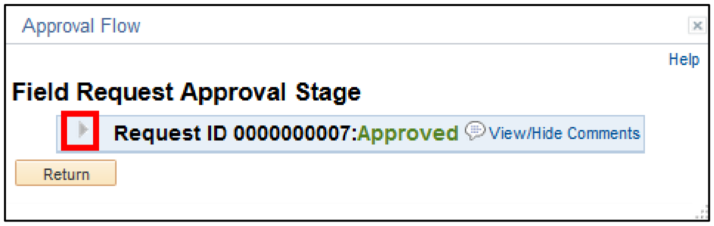
Set the **Request Status** field to blank and click **Search** then select the appropriate request:



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



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: