******VISION Service Request (VSR) Form**

**Purpose:** To request a new VISION service per VISION Procedure #10 “VISION Service Request (VSR) Procedure” (<http://finance.vermont.gov/policies-and-procedures/vision-procedures>).

**VSR Form Instructions:**

* All Basic Information is required and must be completed.
* All General Questions are required and must have detailed and thorough answers. If a General Question is not applicable, enter “N/A”.
* All questions pertaining to the type of service being requested are required and must have detailed and

thorough answers. Questions for a type of service not being requested may be left blank.

* To copy and paste in documentation from another source, please do the following:
	+ Copy the documentation from the source file.
	+ In the VSR Form, right click into the appropriate answer box and select the “Keep Text Only (T)” icon:

under the “Paste Options”.

* All supporting documentation must be attached to the submission e-mail.
* VSR Forms must be submitted by Agency/Department lead Financial Manager to: VISION.FINHelpDesk@vermont.gov.

For assistance with this form, contact the VISION Support Staff at (802) 828-6700, Option 2 or: VISION.FINHelpDesk@vermont.gov.

**BASIC INFORMATION**

**Submitter’s Name:** Click or tap here to enter text. **Submitter’s Title:** Click or tap here to enter text.

**Submit Date:** Click or tap to enter a date. **Department:** Click or tap here to enter text.

**Business Unit:** Click or tap here to enter text. **E-mail:** Click or tap here to enter text.

**Phone Number:** Click or tap here to enter text. **Requested Due Date:** Click or tap to enter a date.

**Type of Request (mark a “x” on all that apply): \_\_ Interface \_\_ New Functionality \_\_ Modification \_\_ Report**

**GENERAL QUESTIONS**

1. If this request is based on a legislative mandate, federal requirement or administrative directive, reference the basis for the request here and attach all supporting documentation, if applicable, with the submission of the form.

2. If this request is a part of a larger initiative or project, answer a. through d. below:

a. Describe the initiative or project:

b. Provides the timeline of the initiative or project and include start date, current status, and end date:

c. If the initiative or project involves an outside vendor, explain the services the vendor will be providing.

d. Describe the staffing assigned to this initiative or project (ex: Project Manager, Technical Lead, Subject Matter Experts, etc.):

3. Explain how this request aligns with the department’s strategic mission/goals?

4. Will this request provide cost or resource savings? If so, explain.

5. Will this request make it significantly easier for the requesting Agency/Department/Division's staff to access, analyze and report information? If so, explain.

6. Will this request significantly enhance an Agency/Department/Division's processes or functions? If so, explain.

7. Will not implementing the request result in penalties, lost federal funding or benefits, or higher future costs? If

so, explain.

8. Is this request a result of an audit finding? If so, what was the finding and from what audit?

9. Does this request involve any other State Agency or Department? If so, indicate what Agency/Department(s) and how it involves them.

**INTERFACE**

**Definition:** VISION data sent to or received from a third-party system (anything other than VISION).

**Types of Interfaces Currently Provided by VISION:** A/P vouchers, direct journal deposits, ONL journals, billing and data extracts.

**Complete the following questions only if an Interface is being requested:**

***Requesting a modification to an existing Interface***

1. What is the existing interface?

2. What is the change requested to the existing interface?

3. Explain the need for the change to the interface and what goal will be achieved with the change.

***Requesting a new Interface***

1. What type of interface is being requested?

a. What is the expected volume of transactions to be interfaced and expected frequency of the interface?

2. Explain the need for an interface and what goal will be achieved with an interface?

3. Is the State expected to host the solution or will it be hosted by an outside vendor?

**NEW FUNCTIONALITY**

**Definition:** Supported functionality in VISION that the Agency/Department does not currently use. An example is a request to use the billing module. Also considered new functionality is a request for a new business unit.

**Complete the following questions only if New Functionality is being requested:**

1. What type of new functionality is being requested?

2.Explain the need for the new functionality and what goal will be achieved with the new functionality.

3. If this request is to add Billing functionality:

 a. What is the volume and frequency of the billings?

 b. Is there a need to send out invoices?

4. If this is a request for a new business unit:

 a. Explain the need for a new business unit and what goal will be achieved with a new business unit.

b. Is this a request for a General Ledger(GL) business unit and will it replace a current GL business unit? If so, provide details.

c. If this is not a request for a new GL business unit, which module(s) is the business unit being requested for and what is the GL business unit it will roll up to?

**MODIFICATION**

**Definition:** Delivered functionality, fields or views are altered in VISION to capture additional data or address a specific State need.

**Complete the following questions only if a Modification is being requested:**

***Requesting a Modification to an Existing Modification***

1. What is the existing modification?

2. What is the change requested to the existing modification?

3. Explain the need for the change to the modification and what goal will be achieved with the change.

4. Does this request involve confidential data or are there particular security restrictions? If so, explain.

***Requesting a New Modification***

1. What type of modification is being requested?

2. Explain the need for a modification and what goal will be achieved with the modification.

4. Does this request involve confidential data or are there particular security restrictions? If so, explain.

**REPORTS**

**Definition:** An extraction of data from VISION compiled in a useful form to meet the needs of the reviewer.

**Types of Reports & Queries Currently Provided by VISION:** Review the Reporting Manual prior to requesting a new report and/or query (<http://finance.vermont.gov/training-and-support/vision-manuals/reporting-manual>).

**Complete the following questions only if a Report is being requested:**

***Requesting a Modification to an Existing Report and/or Query***

1.What is the existing report and/or query name?

2. What is the change requested to the existing report and/or query?

3. Explain the need for the change to the report/query and what goal will be achieved with the change.

4. Does this request involve confidential data or are there particular security restrictions? If so, explain.

***Requesting a New Report and/or Query***

1. What is the objective of this new report and/or query?

2. Explain the need for the new report/query and what goal will be achieved with the new report/query.

3. What data fields need to be on the report and/or query?

4. What criteria does the report/query need to prompt for?

5. What is the output format being requested (Excel, .csv, PDF, HTML, etc.)?

6. Does this request involve confidential data or are there particular security restrictions? If so, explain.