# insights

NOVEMBER, 2018 VOLUME 1, ISSUE 9


***Your window into the VISION Upgrade to v9.2 Project***

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VISION Upgrade to v9.2

*I cannot say whether things will get better if we change; what I can say is they must change if they are to get better.*

- Georg C. Lichtenberg

## What's New in Expenses

For many users entering, and/or approving expenses are the only times they use VISION. Many of them only access the system once or twice a year so each time they log-in to VISION can seem like starting over again.


To help make it as easy as possible to enter and approve expenses a number of changes will be implemented with the v9.2 upgrade: All information, including accounting details will be on one page, no more clicking on the "Details" link; When creating an expense report, you will be notified if you have an outstanding cash advance or travel authorization; You will be able to attach receipts to an expense report; Expense reports returned for revisions will update the accounting and budget dates reducing the need for blackout periods and duplicate report entry at month-end. See pages 2 and 3 for more information.

## Message from the Sponsors

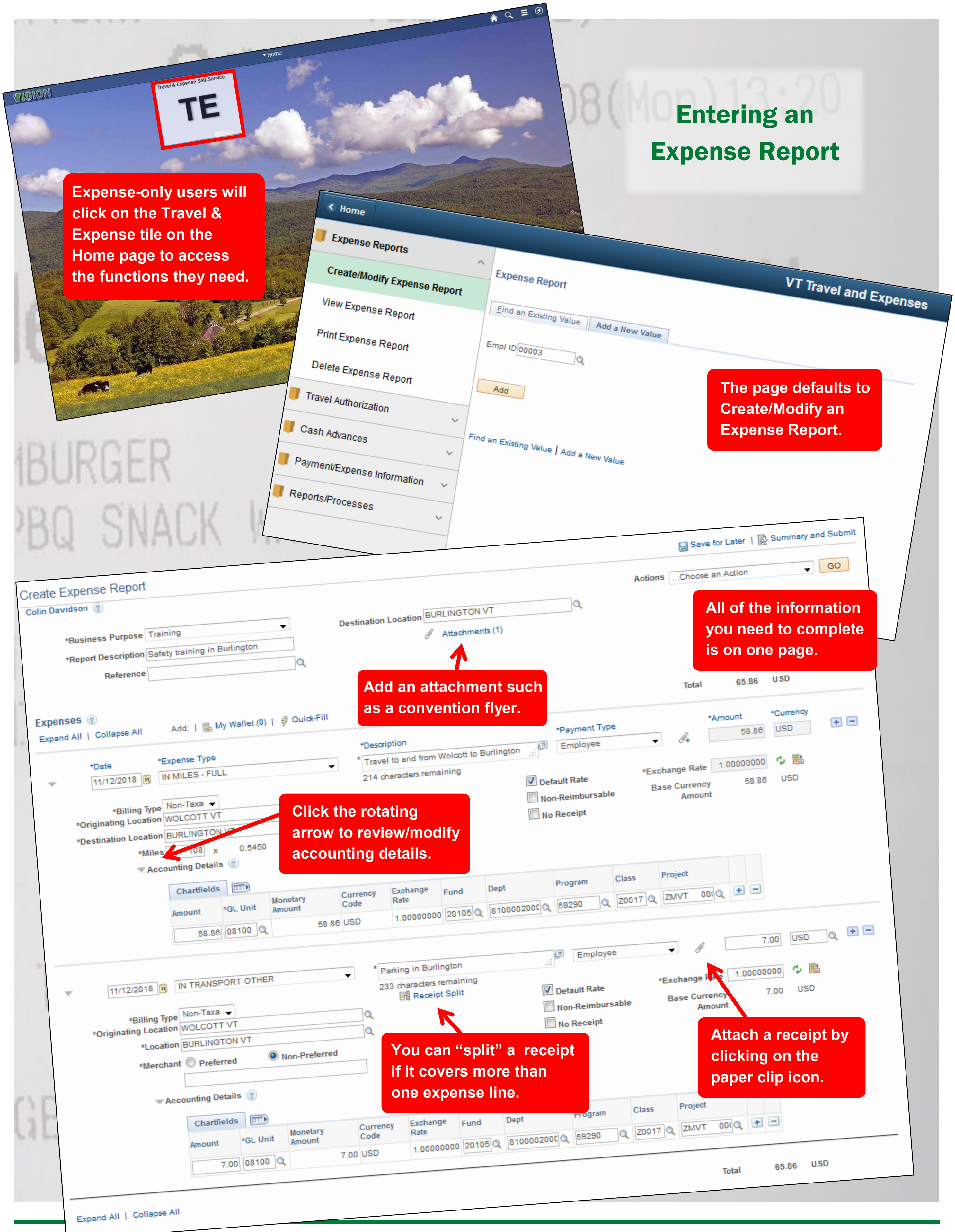
Of the approximately 8,000 VISION users, nearly 7,000 only use the State's financial system to enter and/or approve expenses and many of these expense-only users may access VISION only a few times a year. One of the primary goals of the upgrade project is to make it easier for these infrequent users to complete the tasks needed to be reimbursed for expenses.

We believe the project team has delivered this in a variety of ways. First, they have made navigation easier by adding a Travel & Expense Self Service tile to the home page that takes them to the VT Travel and Expenses page with links to all the functions they will need, including a worklist for expense approvers. Second, reminders will pop up if a user has approved cash advances or travel authorizations that have not yet been applied to an expense report. Third, all the information will be entered on one screen, users will no longer need to open a separate "detail" page to complete an expense line. Finally, users will be able to attach receipts directly to the appropriate expense line, eliminating the need to route paper receipts to approvers.

The expense module affects by far the most VISION users who are often the most infrequent users. We are pleased with how the expense functionality is turning out and think you will be as well.

*– Adam Greshin, Commissioner - Department of Finance and Management*
*– Brad Ferland, Deputy Secretary - Agency of Administration*

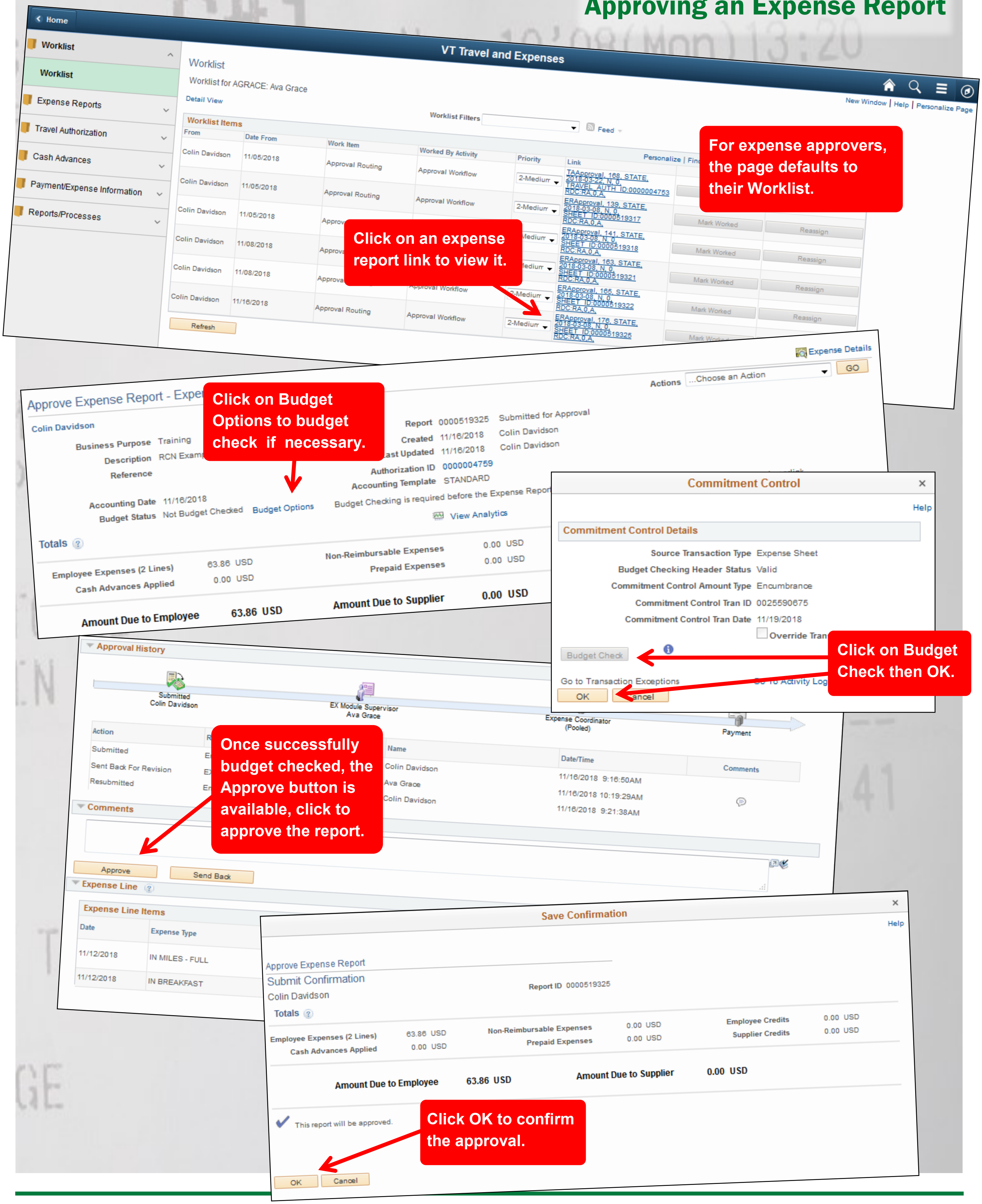
# Entering an Expense Report




http://finance.vermont.gov/vision-v9.2-project-home

VISION.Upgrade@vermont.gov

# Approving an Expense Report

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## Training Update

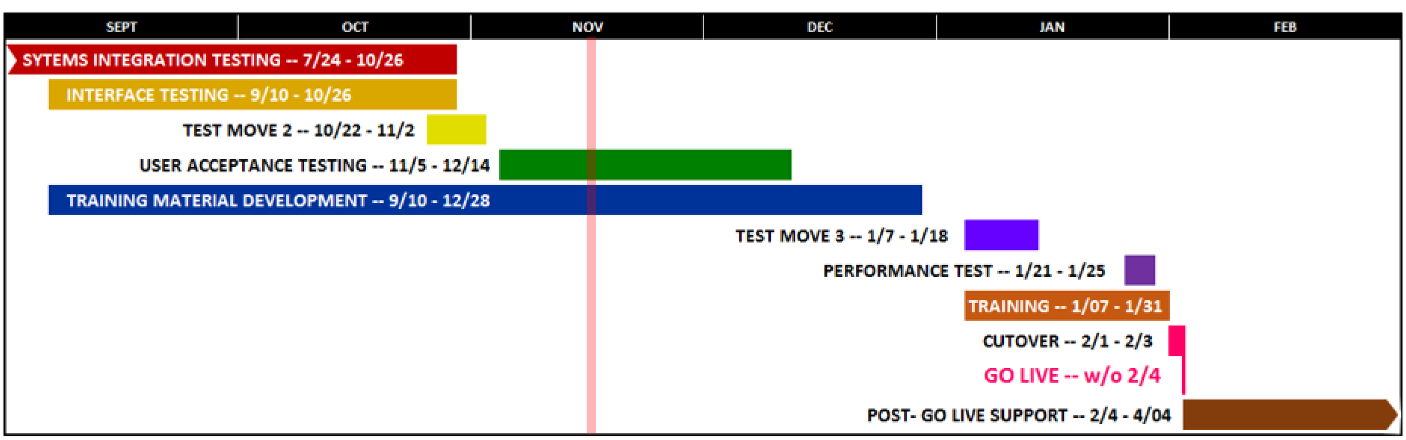
As of mid-November the project team is continuing to work through updating the State's VISION support materials. With approximately 50% of the materials updated we are on track to have the 21 manuals and job aids ready to go by the start of January. In addition to the manuals and job aids, we will be producing webinars to cover expenses and new functionality in other modules. Some of these will be presented live but all will be recorded and available for viewing at your convenience.

We will also be providing a sandbox environment during the month of January so that you can use the updated manuals to go in to the new system and try it out. To give you an opportunity to ask questions and receive one-on-one help, we'll schedule open lab sessions in our 109 State Street training room where project team members will be available to help. Look for webinar and open lab session schedules in the December issue of *Insights* and on our VISION Upgrade to v9.2 project web sight at http://finance.vermont.gov/vision-v9.2-project-home.

While change is always challenging frequent users should find most of the changes self-evident and fairly easy to pick up. For more complex and/or wide-reaching changes, the project team is confident that you will have the information you need to succeed.

## Project Status Update

As of the publishing date, the project remains on track to go live the first weekend of February, 2019. Systems integration testing and the second test move are complete, User acceptance testing is underway, and the team continues to work on training materials development. Scope, schedule, and budget all remain in an "at risk" status as the project team continues to work out the project planning details to get us to the February go live.




**IN SCOPE**

**ON SCHEDULE**

**WITHIN BUDGET**