VISION Expense Access Request Form Guide

This guide walks you through steps for Entering and Updating the VISION Operator Access Request Form. This form is used to grant access to the VISION Expense module and determines the security level around that access (ie: User, Expense Coordinator, Approver).

State of Vermont

Department of Finance & Management

August 2019

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Completing the VISION Expense Access Request Form

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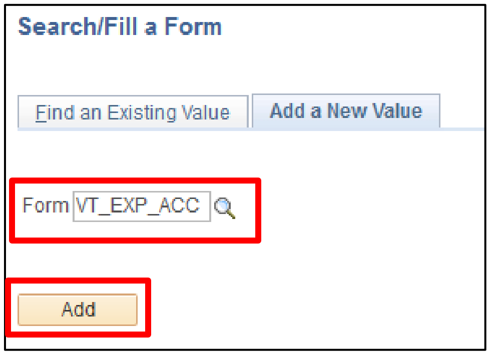
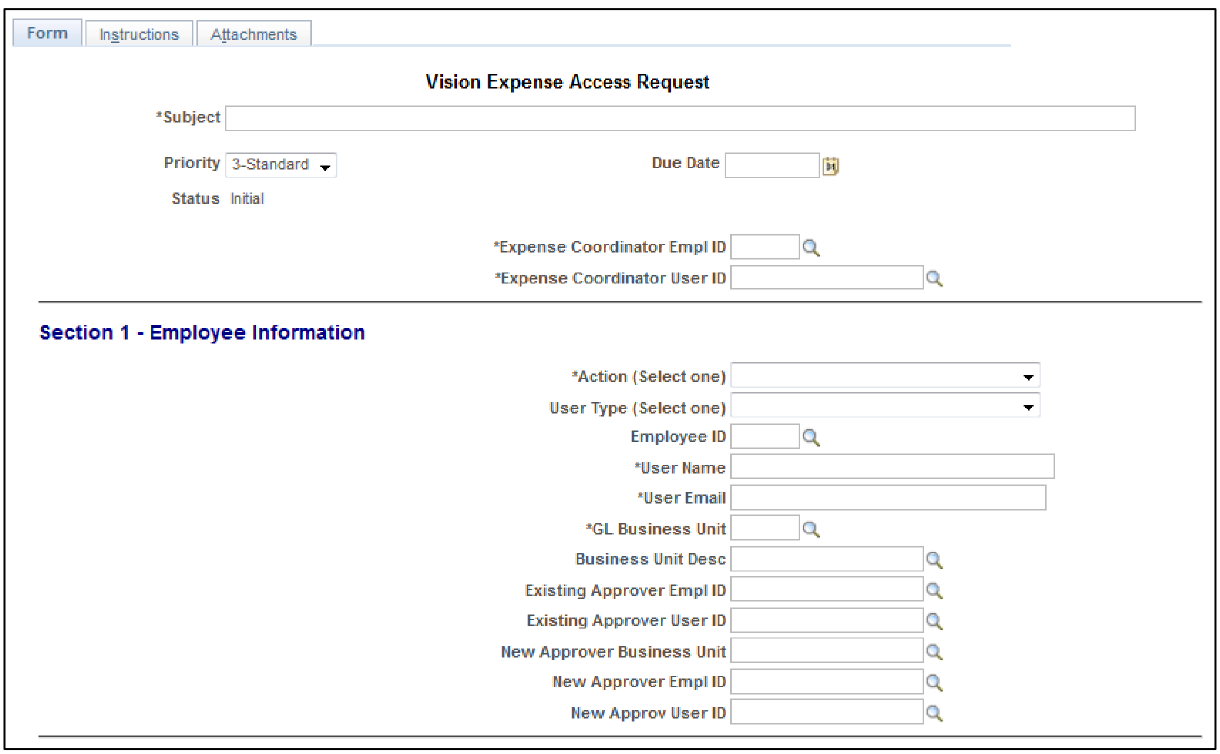
Navigator menu navigation: Travel and Expenses > Manage Expenses Security > Expense Access Form > VISION Expense Access Request

The **Search/Fill a Form** page displays, click on the **Add a New Value** tab:



1. **Form -** Select VT_EX_ACC – Vision Expense Access Request using the look up feature
2. Click **Add**

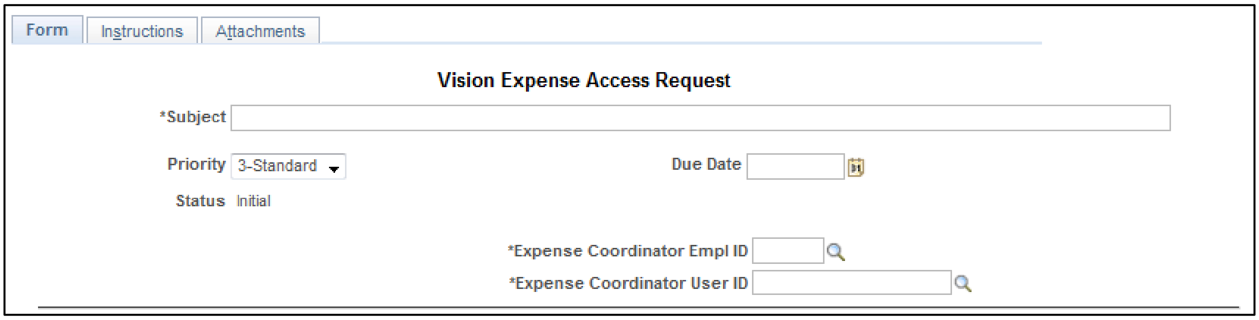
The **Vision Expense Access Request Form** displays:



It is **VERY IMPORTANT** to fill in this form from top to bottom, going back or not following the order could result in inaccurate data.

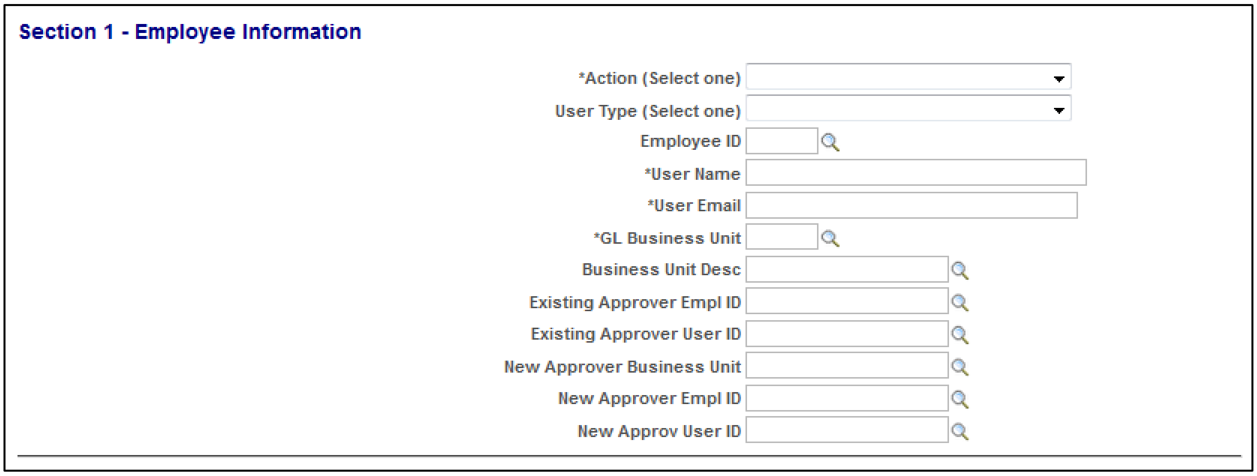
Top Section

NOTE: All fields marked with an asterisk (*) are required.



3. **Subject -** Enter the reason/description for this request (Ex: John Smith, 12345 new access)
4. **Priority –** Accept default. ***Note: Changing the status will not change the standard processing time which can run anywhere from same day to five business days***
5. **Due Date -** Enter date that the request is being submitted. ***Note: Dates will not affect processing time***
6. **Status –** Defaults, this will indicate the status the form is in for the process
7. **Expense Coordinator EMPLID -** Employee ID number
8. **Expense Coordinator Name -** Will default when the magnifying glass is selected based on Exp. Coordinator EMPLID

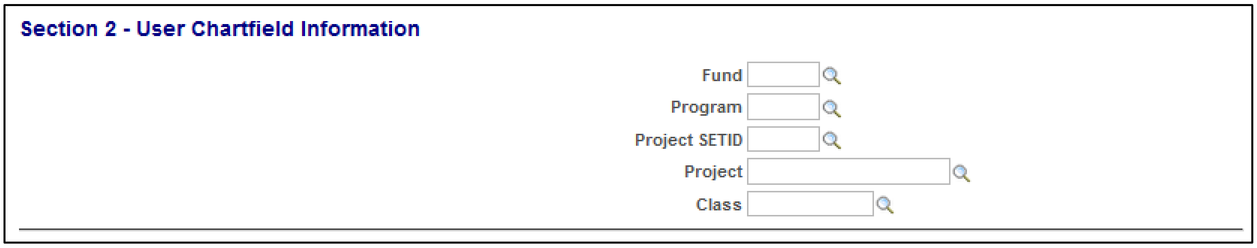
Section 1- Employee Information


Section 1 - Employee Information

*Action (Select one)
User Type (Select one)
Employee ID
*User Name
*User Email
*GL Business Unit
Business Unit Desc
Existing Approver Empl ID
Existing Approver User ID
New Approver Business Unit
New Approver Empl ID
New Approv User ID

9. **Action -** Select an appropriate action
    - Add Expense Coordinator: This action sets up a new Expense Coordinator and can add Dept ID's to a current Expense Coordinators access. ***Note: This access requires the Expense Signature Authority form to be completed and attached to this form using the attachment tab***
    - ADD New User: Choose this to create a new account One does not already exist)
    - Chartfield Change: This will update the users Chartfields only
    - Supervisor Change: This will assign or change the user's supervisor
    - Update User: This will update an existing user. Update any fields that apply to the user
    - Remove User: This action will remove expense access for the user
10. **User Type -** Select one. ***Note: This field indicates whether this is an employee or non-employee (non-employees would only have the Supervisor role to approve reports***
11. **Employee ID -** Employee ID number, leave blank for Non-Employees
12. **User Name -** User's Full Name (First and Last)
13. **User Email -** This email should be the state email for the user. For non-employee's, please list their business email
14. **GL Business Unit -** Enter the Agency/Department GL Business Unit
15. **Business Unit Desc -** BU name – will default when prompt (magnifying glass) is selected based on GL Unit above
16. **Existing Approver Empl ID# -** Please click on the field prompt (magnifying glass) to see if there is an existing supervisor in VISION. If there is an existing approver, the employee ID number will populate the field
17. **Existing Approver User ID -** Please click on the field prompt (magnifying glass) if there was an Existing Approver EMPLID. If there is an existing approver, the employee ID number will populate the field
18. **New Approver BU -** Enter the business unit of the user's new approver
19. **New Approver Empl ID -** This is the employee ID number of the approver for the user in Section 1
20. **New Approver User ID -** Enter the new approver's full name (First and Last)

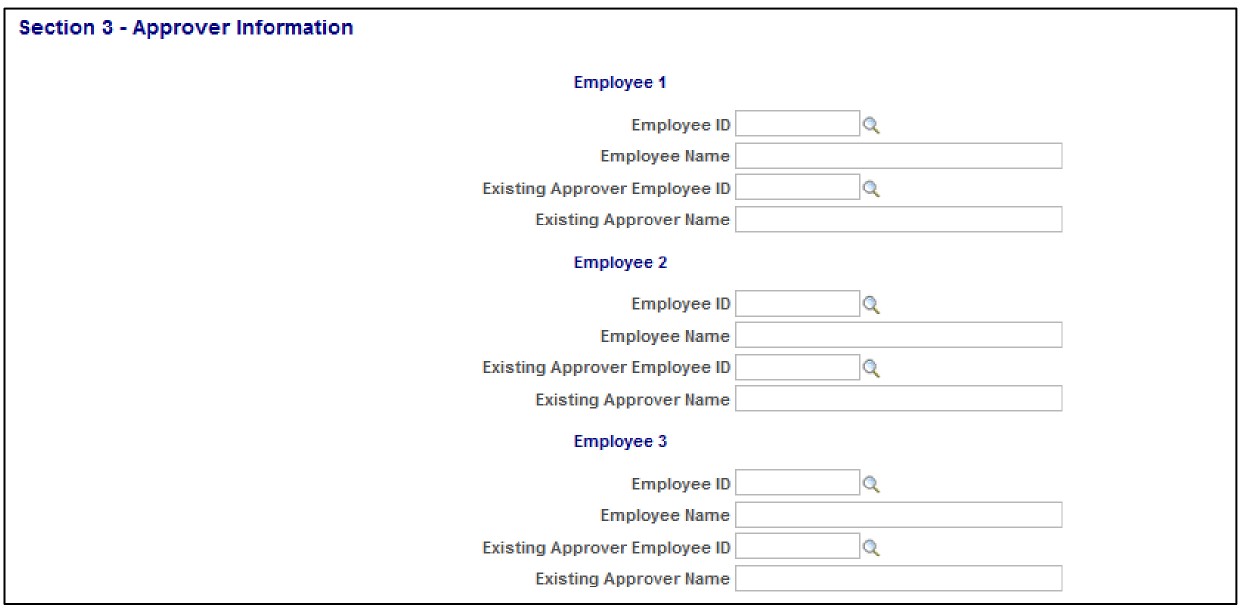
Section 2 – Chartfield Information



This is the chartfield information that default into expense transactions.

21. Fund - Enter the employee's default fund code. ***Note: This is a required field***
22. Program - Enter the employee's default program code, if needed
23. Project SETID - Enter the business unit that corresponds to the project code. This field is required if using a project chartfield.
24. Project - Enter the employee's default project code, if needed
25. Class - Enter the employee's default class code, if needed

Section 3 – Approver (Supervisor) Information

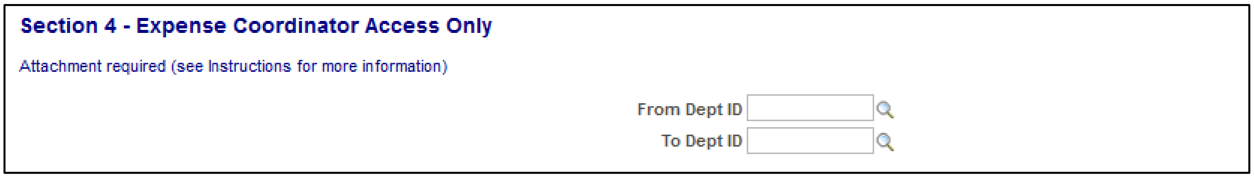


Approver Information is required for adding a new user with Approver Security. Enter the names of the employees and their employee numbers of those the user will be approving expense transactions for. If this requires more than the 8 fields provided, another form must be submitted.

26. Employee ID - Employee ID that the User in Section 1 will be approving expenses for
27. Employee Name - Full name of employee that the User in Section 1 will be approving expenses for
28. Existing Approver Empl ID - Click on the prompt (magnifying glass) for this field to see if there is an existing approver in VISION for employee listed in field above
29. Existing Approver Name - Click on the prompt (magnifying glass) if there is a value in Existing Approver Empl ID field

Repeat the above steps for each employee the user will be supervising.

Section 4 – Expense Coordinator Access


Section 4 - Expense Coordinator Access Only

Attachment required (see Instructions for more information)

From Dept ID

To Dept ID

For Expense Coordinator Access ONLY - Required for adding and updating Expense Coordinator Security.

**All Expense Coordinators will need to have the VISION Security Signature Authority Form completed and attached to this request using the “Attachment” tab. The form can be located on our Finance and Management webpage at: http://finance.vermont.gov/forms/vision

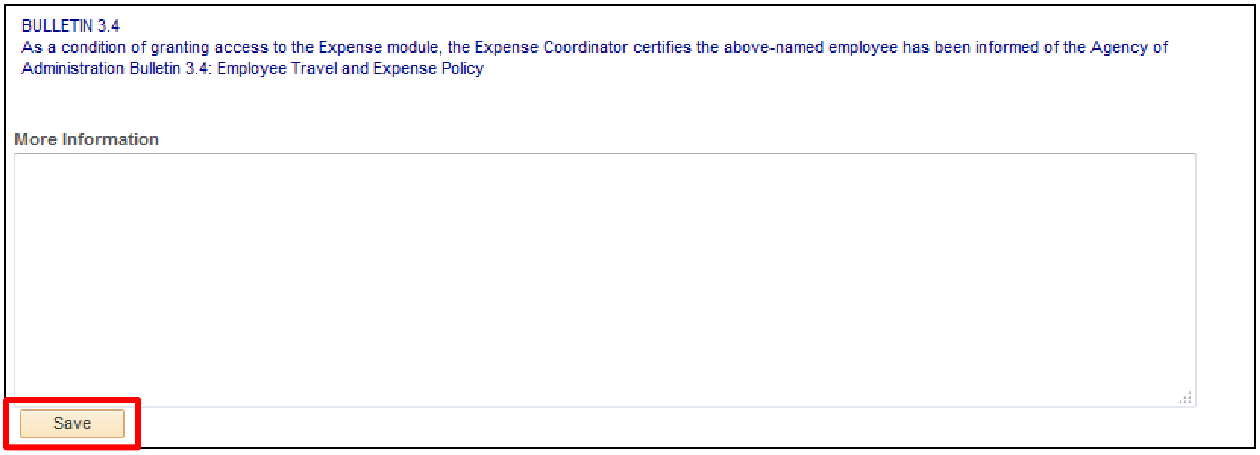
30. **From Dept ID and To Dept ID:** Enter the Department ID or range of Department ID’s that the expense coordinator will need access to when reviewing and approving expense reports, travel authorizations (review only), and cash advances. All State employees have a default Dept. ID based on their position. Expense coordinators can only see reports for the Dept. ID’s that they are assigned to

    If an Expense Coordinator should have access to all Department ID's type "ALL" in the More Information section below

    If the expense coordinator needs multiple but not all Dept ID’s, give the range here or indicate in the More Information section which Dept ID’s the Expense Coordinator should have access to for approvals

    To delete access to a Department ID type "Dept ID - delete" in the additional information section below

Section 5 – More Information



BULLETIN 3.4
As a condition of granting access to the Expense module, the Expense Coordinator certifies the above-named employee has been informed of the Agency of Administration Bulletin 3.4: Employee Travel and Expense Policy

More Information

Save

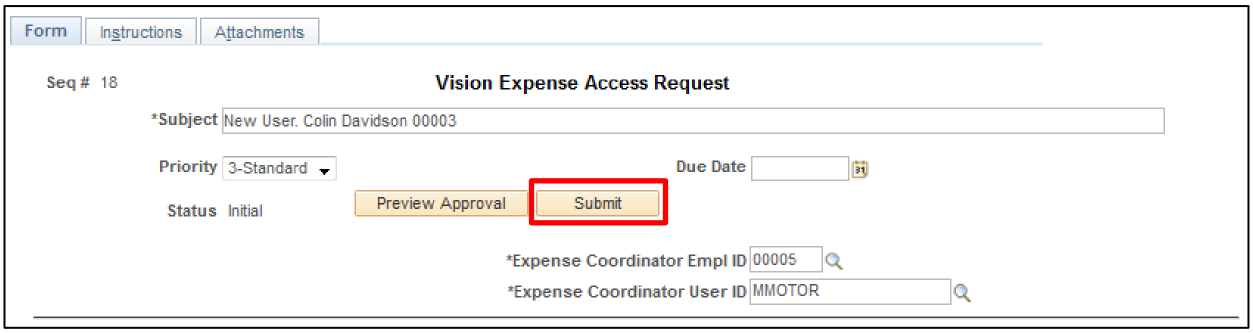
Please add any notes, or any additional information here that will help us better understand your request and process this request efficiently.

Submit the Form

Double check the request to make sure that all fields contain the correct information and that all proper documentation is attached. This step is important because once a requester submits a request, they will not be able to access it again unless it is denied by VISION Support. Additionally, VISION Support cannot change any information that is entered by the requester so if anything is entered incorrectly or entered into the wrong fields, the request will be denied by VISION Support and sent back to the requester for correction and resubmission.

31. Click **Save**

The Preview Approval and Submit buttons become available at the top of the form:



32. Click **Submit** - All requests will be handled by the date/time in which the requests are received. Processing times run anywhere from the same day to five business days

Check the Form Status

Check the status of your requests using queries

VT_EXPENSE_SECURITY_FORM - This query allows you to find a form using a date range.

VT_EXPENSE_SEC_BY_FORM_NBR - This query allows you to find a form using the form number.

Either query returns the following fields: Form Number; Requester; Subject; Expense Coord; GL Unit; ID; Employee Name; Action Requested; Date Submitted; Status; Date Last Updated; Comments.

VT_EXPENSE_FORM_ALL_FIELDS – This query allows you to search for a form using a date range, form status, and a range of form numbers. The query returns all fields on a form ***except*** the Comments field.

Once a request for a new user is approved and processed, the user will receive an email from VISION Support containing their log in information.

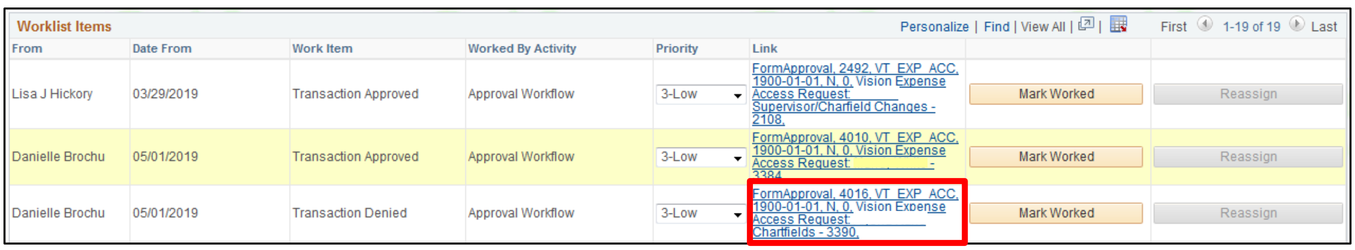
Reviewing denied forms from the Worklist

You may also review denied forms using the Worklist.

WorkCenter navigation: Travel and Expense WorkCenter > Links pagelet > Worklist

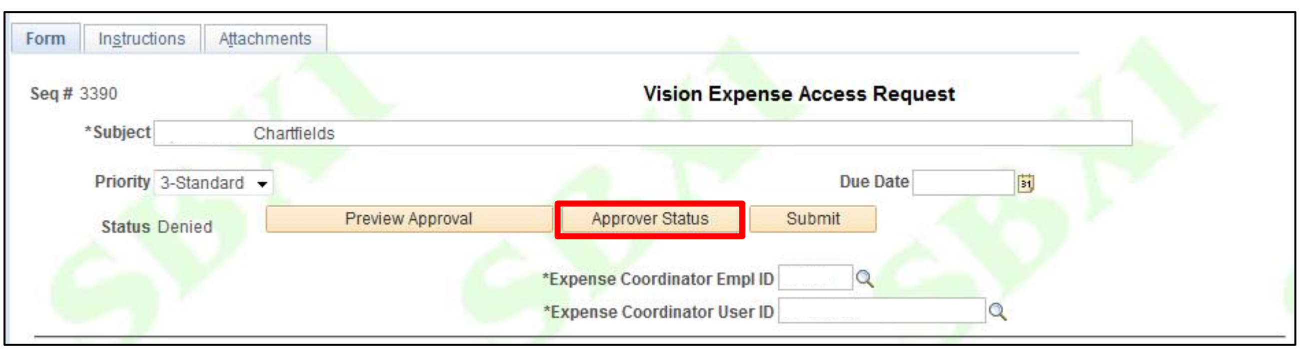
Navigator Menu navigation: Worklist > Worklist

The **Worklist** displays:



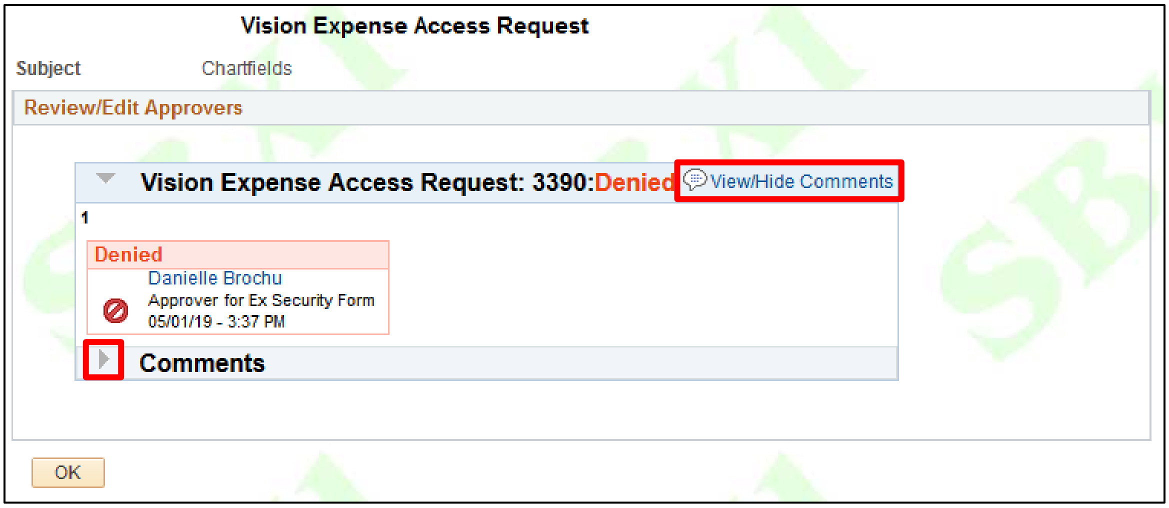
1. Click on the link to open the form

The **form** displays:



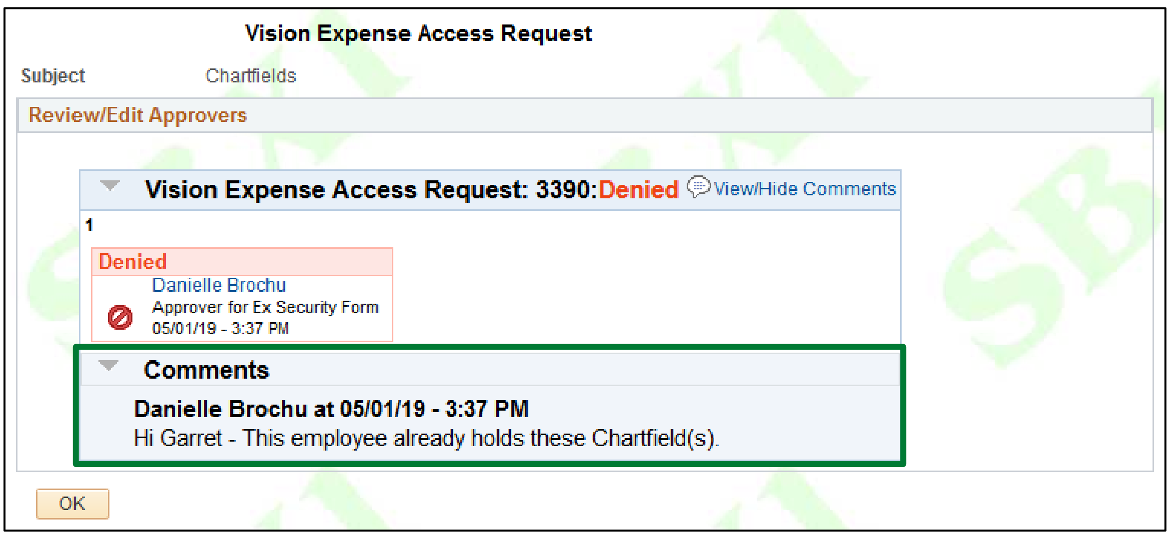
2. Click **Approver Status**

The **Approver Status** page displays:



3. Click on the **View/Hide Comments** link or the **expand arrow**

The **Comments** box expands:



Questions on a form's status can be directed to VISION Support at FIN.VisionSecurity@vermont.gov