



VISION Module Access Request Form Guide

This guide walks you through steps for entering and updating the VISION Module Access Request Form. This form is used to grant access to the VISION finance modules and determine the security levels around that access.

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Completing the VISION Module Access Request Form

WorkCenter navigation: Any Module WorkCenter > Links pagelet > Other Links > VISION Module Security Form

Navigator menu navigation: Module Security Form > Vision Module Security Form

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

Search/Fill a Form

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

Sequence Number = []

Subject begins with []

Document Key String begins with []

Priority = []

Due Date = []

Approval Status = []

Case Sensitive

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

Search Clear Basic Search Save Search Criteria

The **Vision Module Security Form** displays:

Form Instructions Attachments

Vision Module Security Form

*Subject []

Priority [3-Standard]

Due Date []

Status Initial

*Action []

Section 1 - Employee Information

Employee ID []

*Employee Name []

*Employee Email Address []

*Business Unit []

GL Business Unit Description []

*Business Unit Default []

Business Units Requested for Operator Access:

From BU []

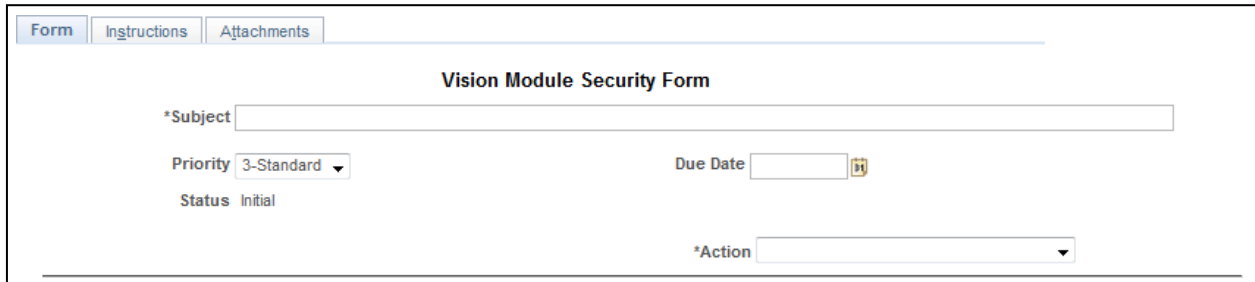
To BU []

All BU's []

It is **VERY IMPORTANT** that this form be completed from the top down, and ALL fields with an asterisk are filled in. Due to the limited functions of this form, not completing the form in order can skew the prompt results and you will need to start a new form.

Note: If you are updating an existing VISION User you may indicate only the desired change and add the following to the [comment section](#): “Leave all other access as is.”

Top Section



The screenshot shows the top section of the 'Vision Module Security Form'. At the top, there are three tabs: 'Form', 'Instructions', and 'Attachments'. Below the tabs, the title 'Vision Module Security Form' is centered. The form contains several fields: a text input field for '*Subject', a dropdown menu for 'Priority' set to '3-Standard', a date input field for 'Due Date' with a calendar icon, a text input field for 'Status' set to 'Initial', and a dropdown menu for '*Action'.


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

- 1. Subject** - Enter the reason/description for this request. (ie: John Smith, 12345 new access)
- 2. 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.**
- 3. Due Date** - Enter date that the request is being submitted. Dates entered will not affect processing time
- 4. Action** – Select an appropriate action:
 - Add New User: This will create a new account for the user (they do not have a VISION account)
 - Remove User: This will remove all VISION module access to VISION
 - Update User: This will update security for an existing VISION user

Important Note: List all current access as well as the change(s) you want to make, otherwise; if you indicate only the change, that is the ONLY access the user will be given.


Section 1-User (Employee) Information


Section 1 - Employee Information


Employee ID 

*Employee Name


*Employee Email Address


*Business Unit 


GL Business Unit Description 

*Business Unit Default 

Business Units Requested for Operator Access:

From BU 

To BU 

All BU's 

5. **Employee ID #** - Employee ID number. Non-Employee's leave blank
6. **Employee Name** - Employees Full Name. (First and Last)
7. **Employee Email Address** - This email should be the state email for the user. For non-employee's, please list their business email
8. **Business Unit** - Enter the Agency/Department GL Business Unit
9. **GL Business Unit Description** - Agency/Department name – will default when prompt (magnifying glass) is selected based on GL Unit above
10. **Business Unit Default** - List the Business Unit that you want to default into the modules. These can be changed, but you will want to indicate the most frequently used BU if the user will have more than one
11. **Business Units Requested for Operator Access**
 - **From BU:** This will be the lowest BU number (Ex: 07100)
 - **To BU:** This will be the highest BU number (Ex: 07140). If there is only one BU needed, you would enter 07100 to 07100
 - **All BU's:** If an employee should have ALL business units you will indicate that here using the dropdown menu of "All Business Units"

Section 2 – Module Security

Section 2 - Module Security

Modules

Asset Management	<input type="text"/>
Accounts Payable	<input type="text"/>
Accounts Receivable	<input type="text"/>
Billing	<input type="text"/>
General Ledger	<input type="text"/>
Commitment Control	<input type="text"/>
Purchasing	<input type="text"/>

12. Modules/Levels: These are the VISION modules. Please select from the dropdown menu the access level that you would like the Operator to have. If you do not wish to assign security in a module, assign “None” in the dropdown menu

- AM, AP, AR, Billing, GL, KK and PO:
- **None:** If no access is required
- **Level 1:** Display only
- **Level 2:** Data Entry/Processing
- **Level 3:** PO module only - Level 2 access PLUS approval
- **PO Central Purchasing Only:** Purchasing Agent Access

Section 3 - Grant Tracking

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VT Grant Tracking

Grant Tracking

13. VT Grant Tracking: This is the VISION module for sub-recipient grant tracking. If the user requires access to the grant tracking module select one of the following:

- **None**
- **Level 1** – Display Only
- **Level 2** – Normal Entry
- **Level 3** – Non-Fed Grants Only

Section 4: Signature Authority

This section will require a “**VISION Module Security Signature Authority Form**” to be completed and **attached using the Attachments tab** if any box in this section is checked. You can find this form located on our Finance webpage at: <http://finance.vermont.gov/forms/vision>

Attachments Tab: This tab is at the top of the page and allows documents to be uploaded into the form. Specifically, the VISION Module Security Signature Authority Form (if required) for security access

Section 4: Signature Authority ** This will require a Signature Authority Form to be attached if any boxes are checked**

Signature Authority (Refer to Bulletin 3.3) for Approval

Requisition Approval (Y/N)	<input type="checkbox"/>	
Contract Approval (Y/N)	<input type="checkbox"/>	
Purchase Order Approval (Y/N)	<input type="checkbox"/>	
Accounts Payable Approval (Y/N)	<input type="checkbox"/>	
Direct Journal Approval (Y/N)	<input type="checkbox"/>	
GL Journal Approval (Y/N)	<input type="checkbox"/>	
Supplier Add Request Form (Y/N)	<input type="checkbox"/>	
Supplier Update Request Form (Y/N)	<input type="checkbox"/>	
Chartfield Request Form (Y/N)	<input type="checkbox"/>	
VISION Module Security Request Form (Y/N)	<input type="checkbox"/>	

14. Approvals/Form Access:

- **Requisition Approval** - This gives the user access to approve requisitions for the Agency/Department
- **Contract Approval** - This gives the user access to approve contracts for the Agency/Department
- **Purchase Order Approval** - This gives the user access to approve purchase orders for the Agency/Department
- **Accounts Payable Approval** - This gives the user access to approve vouchers (all types) for the Agency/Department
- **Direct Journal Approval** - This gives the user access to approve accounts receivable direct journal deposits for the Agency/Department.
- **GL Journal Approval** - This gives the user access to approve general ledger journals for the Agency/Department
- **Supplier Add Request Form** - This gives access to the Supplier Add Request Form (formerly VISION Vendor requests)
- **Supplier Update Request Form** - This gives the user access to the Supplier Update Request Form, where they can request changes to supplier information
- **Chartfield Request Form** - This gives the user access to the Chartfield Request Form where they can request to add or change Chartfield information
- **VISION Module Security Request Form** - This gives the user access to this form which allows them to add or update an employee’s security for the department

Section 5: Workflow

Section 5: Workflow	
Workflow	
Voucher Approval (Y/N)	<input type="checkbox"/>
GL Journal Approval (Y/N)	<input type="checkbox"/>
A/R Write-Off Approval (Y/N)	<input type="checkbox"/>
Budget Journal Approval (Y/N)	<input type="checkbox"/>
Billing Credit Invoice Approval (Y/N)	<input type="checkbox"/>
GL Chartfield Approval (Y/N)	<input type="checkbox"/>

15. Workflow - In this section, you will select if the User should have the authority to approve any of the following:

- **Vouchers** - Vouchers are approved through workflow. Selecting this box will place the user into a workflow “pool” of permitted approvers for all voucher transactions. **Note: Users will not be able to approve their own vouchers that they entered in to VISION. If this box is selected, then the accounts payable approval box in Section 4 must be selected and the required form attached**
- **GL Journals** - General Ledger journals will be approved through workflow. Selecting this box will place the user into a workflow “pool” of permitted approvers for journal transactions such as ONL’s and TSF’s. **Note: If this box is selected then the GL journal approval box in Section 4 must be selected and the required form attached**
- **A/R Write-Offs** - This will place the user into a workflow “pool” of permitted approvers to approve write-offs. **Note: This is set up for specific departments only**
- **Budget Journals** - This will place the user into a workflow “pool” of permitted approvers who can approve budget journals. **Note: The user must have Commitment Control access, this access is set up only for specific departments**
- **Billing Credit Invoices** - This will place the user into a workflow “pool” of permitted approvers who can approve credit invoices
- **G/L Chartfields** - This will allow Chartfield requests to be approved by a Department Manager prior to being submitted to Finance. Selecting this box will place the user into a workflow “pool” of permitted approvers for Chartfield changes. **Note: This access is set-up only for specific departments**

Section 6: Forms

Section 6: Forms	
Authorization to Submit Online Forms	
Supplier Add Request Form (Y/N)	<input type="checkbox"/>
Supplier Update Request Form (Y/N)	<input type="checkbox"/>
Chartfield Request Form (Y/N)	<input type="checkbox"/>
VISION Module Security Request Form (Y/N)	<input type="checkbox"/>

16. This section will allow users Authorization to Submit Online Forms – these forms are accessible within VISION

- **Supplier Add** - Allows User to submit requests to add NEW Suppliers in VISION
- **Supplier Update** - Allows User to submit requests to maintain/update Suppliers in VISION
- **Chartfield Request:** - Allows User to submit requests to add/update Chartfield(s) for the Agency/Department
- **Module Security** - Allows User to submit requests to add/update VISION Module security

****These forms will require Signature Authority (See Section 4). ****

Section 7: Interfaces

Section 7: Interfaces	
Interface Access	
Billing Spreadsheet Upload (Y/N)	<input type="checkbox"/>
Deposit Spreadsheet Upload (Y/N)	<input type="checkbox"/>
Voucher Build - Voucher Interface (Y/N)	<input type="checkbox"/>
N/A	<input type="checkbox"/>

17. **Interfaces** - In this section you can grant users access to run interfaces

- **Billing Spreadsheet** - This allows a user access to upload large volumes of billing data into the Billing Module. **Note: Department must be set up to use the Billing module**
- **Deposit Spreadsheet** - This allows the user to upload customer deposits into the Accounts Receivable Module
- **Voucher Build** - This allows the user to access the voucher build pages to work with interfaced vouchers in the Accounts Payable Module. **Note: Only available to specific department**

Section 8: Special Classes and Additional Information

Section 8: Special Classes and Additional Information

Comments

254 characters remaining

More Information

Save

18. Comments/More Information

- List any special classes needed, this will give special access or roles to the user.
- Use this area to add ANY additional information that will help us process your request efficiently.

19. 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 in to the wrong fields, the request will be denied by VISION Support and sent back to the requester for correction and resubmission

20. Click [Save](#)

This will assign the form a sequence number, which is located at the top of the form:

Form Instructions Attachments

Seq # 19

Vision Module Security Form

*Subject Eric Hoefel, xxxxx, new user

Priority 3-Standard

Due Date 01/31/2019

Status Initial

Preview Approval Submit

*Action Add New User

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

Check the Form Status

Check the status of your requests using queries

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

VT_MODULE_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; Reviewer Comments.

VT_MODULE_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 Reviewer 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.

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

Reviewing denied forms from the Worklist

You may also review denied forms using the Worklist.

WorkCenter navigation: Any Module WorkCenter > Links pagelet > Worklist

Navigator Menu navigation: Worklist > Worklist The **Worklist** displays:

Worklist Items						Personalize	Find	View All	First	1-19 of 19	Last
From	Date From	Work Item	Worked By Activity	Priority	Link						
Lisa J Hickory	03/29/2019	Transaction Approved	Approval Workflow	3-Low	FormApproval 2492_VT_EXP_ACC_1900-01-01_N_0_Vision Expense Access Request Supervisor/Charfield Changes - 2108	Mark Worked					Reassign
Danielle Brochu	05/01/2019	Transaction Approved	Approval Workflow	3-Low	FormApproval 4010_VT_EXP_ACC_1900-01-01_N_0_Vision Expense Access Request	Mark Worked					Reassign
Danielle Brochu	05/01/2019	Transaction Denied	Approval Workflow	3-Low	FormApproval 4016_VT_EXP_ACC_1900-01-01_N_0_Vision Expense Access Request Charfields - 3390	Mark Worked					Reassign

The **form** displays:

Form | Instructions | Attachments

Seq # 3390 **Vision Expense Access Request**

*Subject Aly: artfields

Priority 3-Standard Due Date

Status Denied Preview Approval **Approver Status** Submit

*Expense Coordinator Empl ID 18: GF

*Expense Coordinator User ID GF

2. Click **Approver Status**

The **Approver Status** page displays:

The screenshot shows a web interface for a "Vision Expense Access Request". At the top, it says "Subject Alysh fields". Below that is a section titled "Review/Edit Approvers". Inside this section, there is a dropdown menu for "Vision Expense Access Request: 3390:Denied" with a "View/Hide Comments" link next to it. Below the dropdown, there is a "Denied" notification from Danielle Brochu, an Approver for Ex Security Form, dated 05/01/19 - 3:37 PM. A "Comments" link is visible below the notification. An "OK" button is at the bottom left.

3. Click on the **View/Hide Comments** link or the **expand arrow**
The **Comments** box expands:

This screenshot is similar to the previous one, but the "Comments" box is expanded. It shows a comment from Danielle Brochu at 05/01/19 - 3:37 PM: "Hi Garret - This employee already holds these Chartfield(s)". The "View/Hide Comments" link is now "View/Hide Comments" with a speech bubble icon. An "OK" button is at the bottom left.

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