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.

State of Vermont

Department of Finance & Management

VISION 9.2

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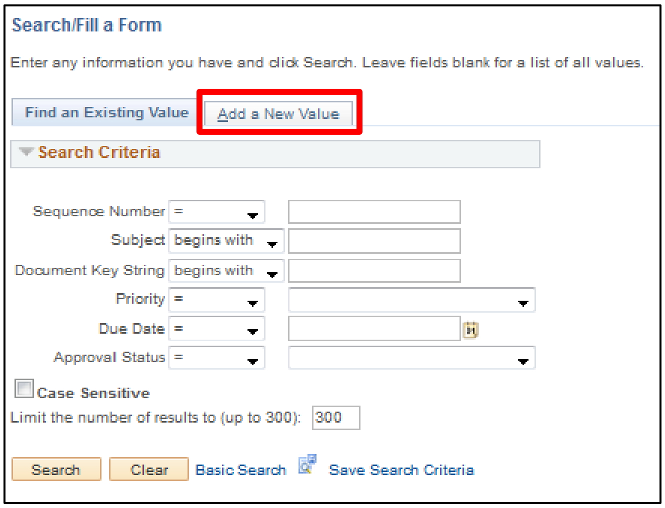
Completing the VISION Module Access Request Form

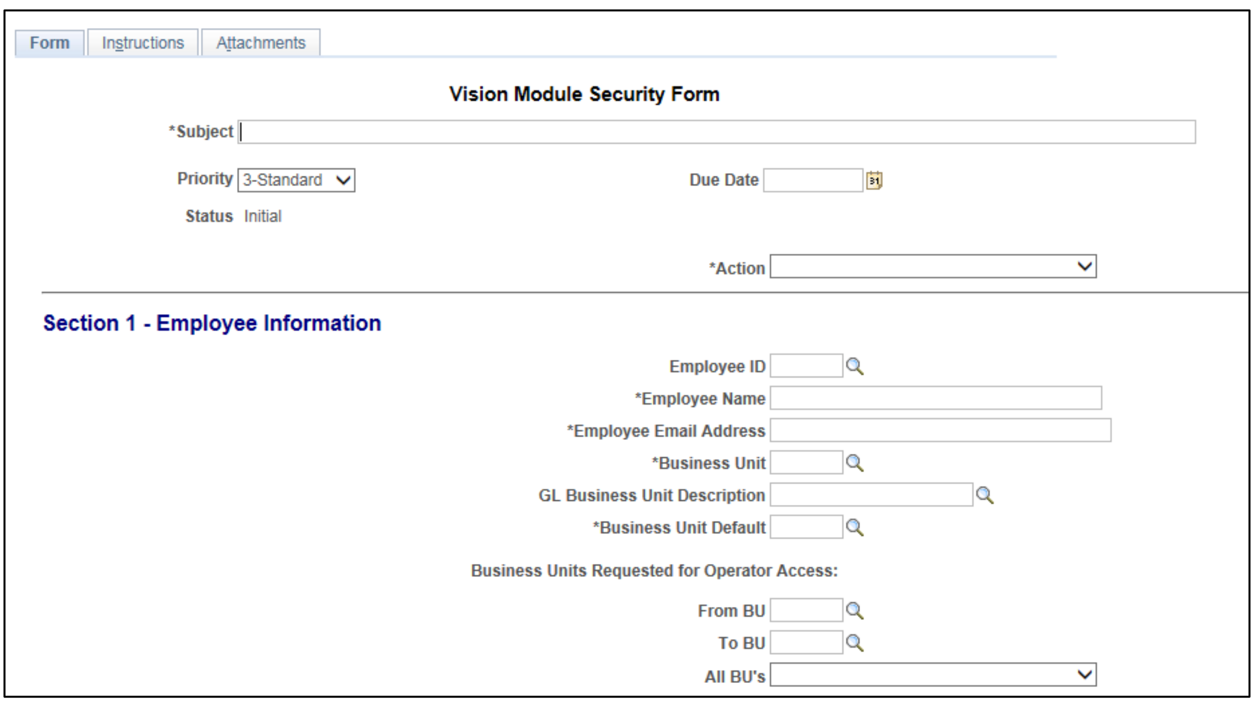
WorkCenter navigation: Any Module WorkCenter > Links pagelet > Other Links > VISION Module Security Form

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

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

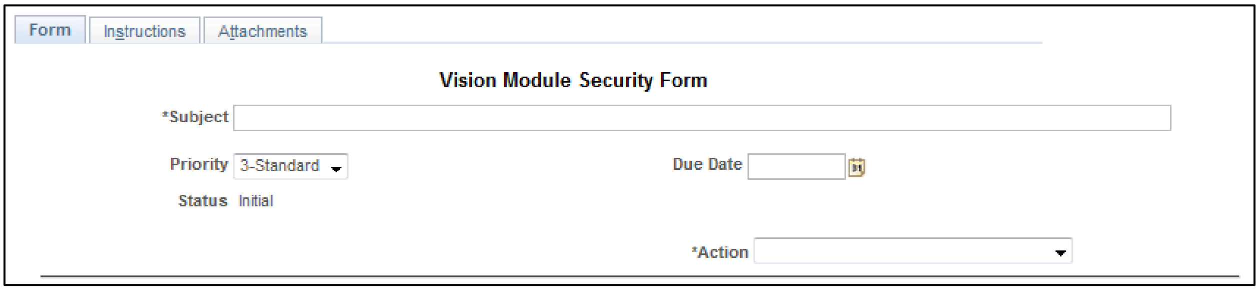


The **Vision Module Security Form** displays:



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.

Top Section

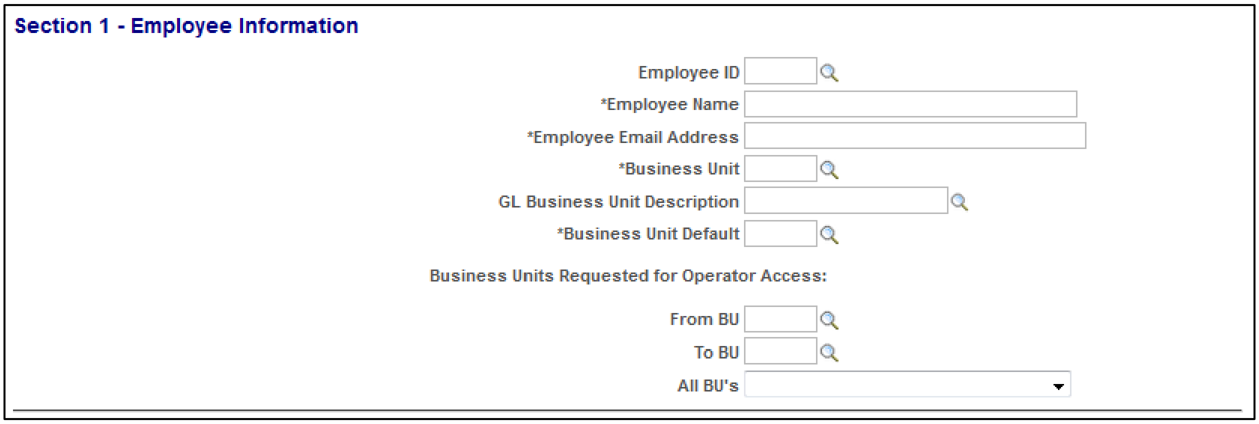


Note: All fields marked with an asterisk (*) are required.

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

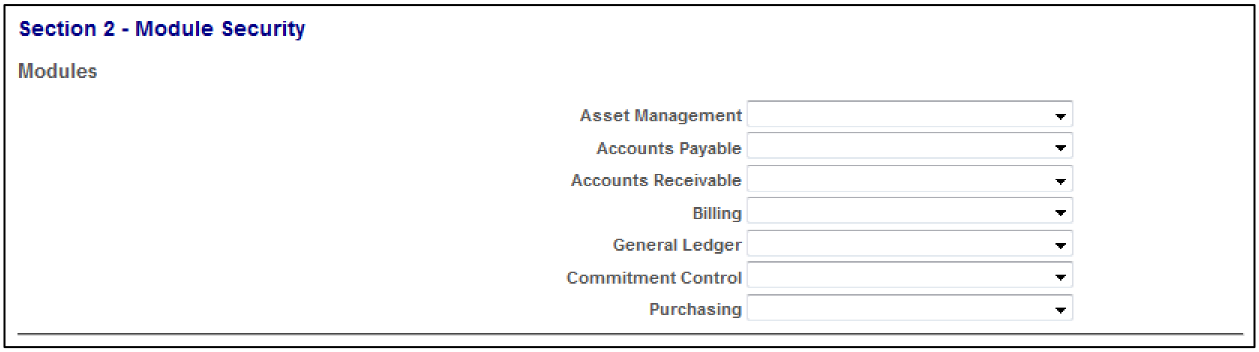
Important Note: List all current access as well as the change(s) you want to make, otherwise; if you indicate only the change, that is the ONLY access the user will be given.

Section 1-User (Employee) Information



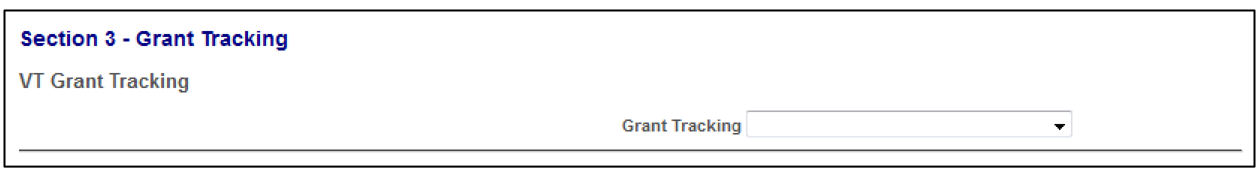
5. **Employee ID # -** Employee ID number. Non-Employee's leave blank
6. **Employee Name -** Employees Full Name. (First and Last)
7. **Employee Email Address -** This email should be the state email for the user. For non-employee's, please list their business email
8. **Business Unit -** Enter the Agency/Department 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



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



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**

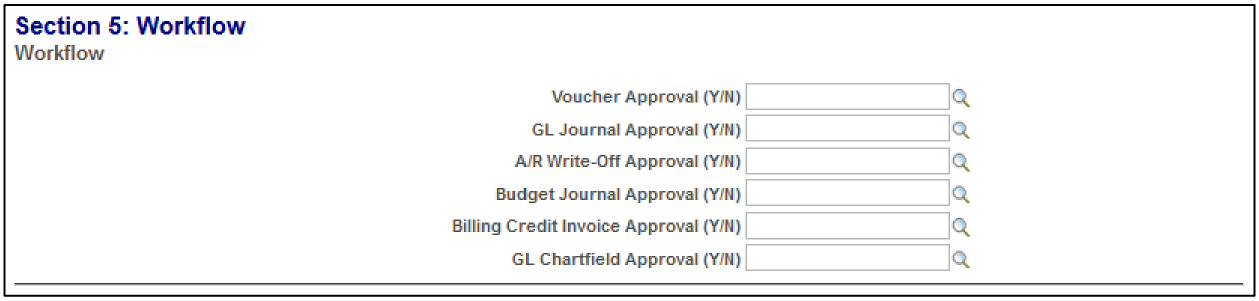
Signature Authority (Refer to Bulletin 3.3) for Approval

Requisition Approval (Y/N)
Contract Approval (Y/N)
Purchase Order Approval (Y/N)
Accounts Payable Approval (Y/N)
Direct Journal Approval (Y/N)
GL Journal Approval (Y/N)
Supplier Add Request Form (Y/N)
Supplier Update Request Form (Y/N)
Chartfield Request Form (Y/N)
VISION Module Security Request Form (Y/N)

14. Approvals/Form Access:

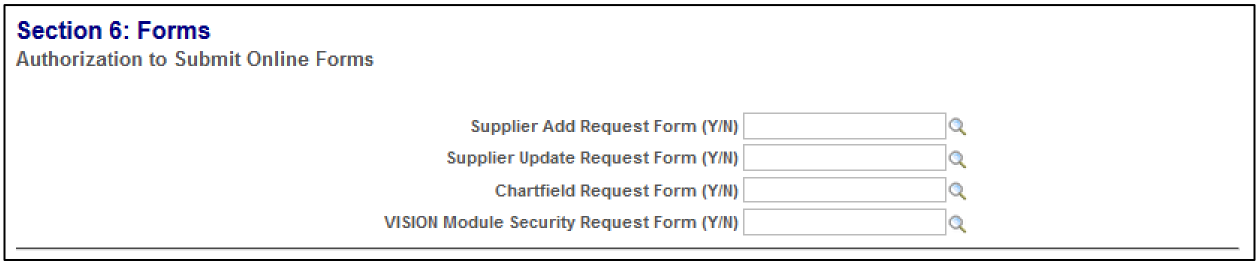
- **Requisition Approval** - This gives the user access to approve requisitions for the Agency/Department
- **Contract Approval** - This gives the user access to approve contracts for the Agency/Department
- **Purchase Order Approval** - This gives the user access to approve purchase orders for the Agency/Department
- **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



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

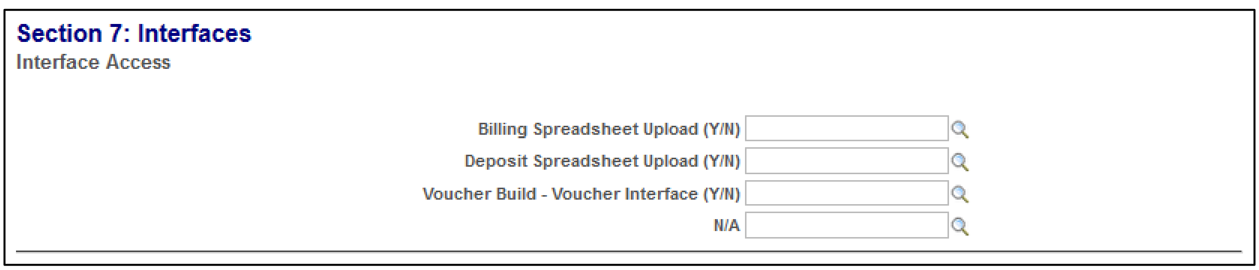

Section 6: Forms
Authorization to Submit Online Forms

Supplier Add Request Form (Y/N)
Supplier Update Request Form (Y/N)
Chartfield Request Form (Y/N)
VISION Module Security Request Form (Y/N)

16. This section will allow users Authorization to Submit Online Forms **–** these forms are access 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). ****

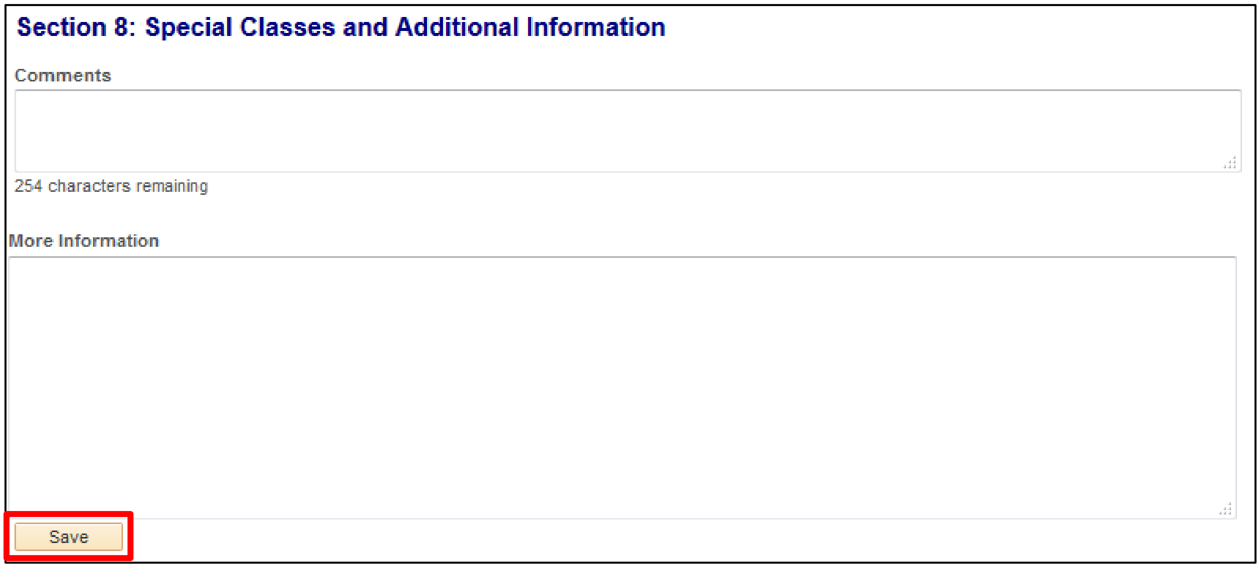
Section 7: Interfaces


Section 7: Interfaces
Interface Access

Billing Spreadsheet Upload (Y/N)
Deposit Spreadsheet Upload (Y/N)
Voucher Build - Voucher Interface (Y/N)
N/A

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



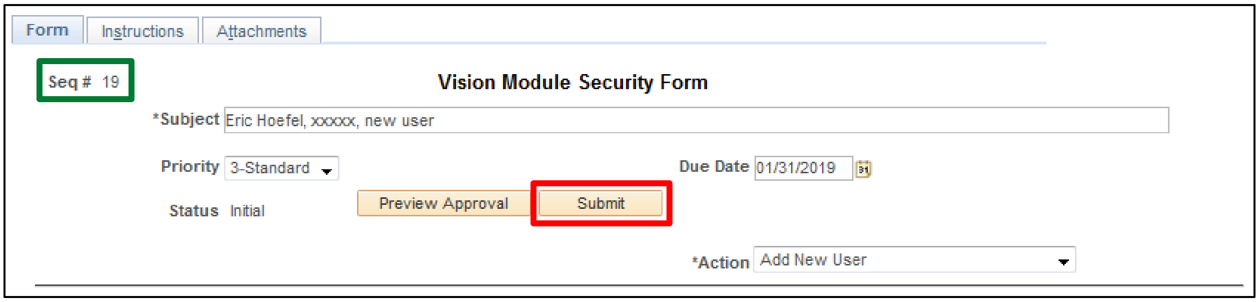
18. Comments/More Information

- 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**

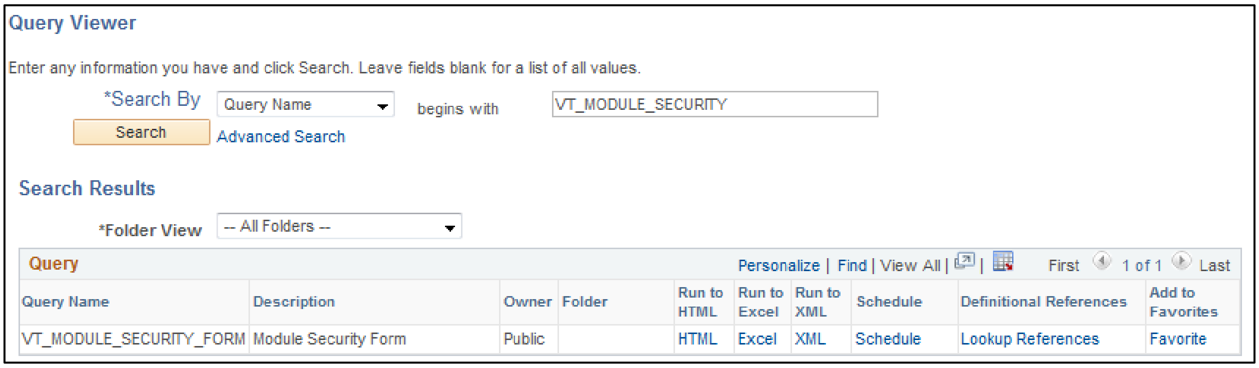
This will assign the form a sequence number, which is located at the top of the form:



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 by running the VT_MODULE_SECURITY_FORM query. This query will provide you with the status of the request (i.e., Initial, Pending Approval, Approved, Denied) so that you can view them to see if corrections are needed or not.



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