



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
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Completing the VISION Expense Access Request Form

WorkCenter navigation: Expense Coordinator WorkCenter > Links pagelet > Other Links > VISION Expense Access Request

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** button:

Search/Fill a Form

Find an Existing Value + Add a New Value

▼ Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches Saved Searches

Sequence Number =
Subject begins with
Document Key String begins with
Priority =
Due Date =
Approval Status =

[Show fewer options](#)

Case Sensitive

1. Click the **Add a New Value** button

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

Vision Expense Access Request

Form | Instructions | Attachments

Vision Expense Access Request

*Subject

Priority Due Date

Status Initial

Note: Priority and Due Date are not used

***IMPORTANT* ENTER DATA IN FIELD ORDER FROM TOP OF FORM TO BOTTOM**

*Expense Coordinator Empl ID

*Expense Coordinator User ID

Section 1 - User Information

*Action (Select one)

User Type (Select one)

Employee ID

*User First and Last Name

*User Email

*GL Business Unit

User's Existing Approver Empl ID (click mag glass to find existing approver)

User's Existing Approver User ID

New Approver Business Unit

New Approver Empl ID

New Approver User ID

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.

Form | Instructions | Attachments

Vision Expense Access Request


*Subject


Priority Due Date 

Status

Note: Priority and Due Date are not used

***IMPORTANT* ENTER DATA IN FIELD ORDER FROM TOP OF FORM TO BOTTOM**

*Expense Coordinator Empl ID 

*Expense Coordinator User ID 

- 2. Subject** - Enter the reason/description for this request (Ex: John Smith, 12345 new access)
- 3. 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**
- 4. Due Date** - Enter date that the request is being submitted. **Note: Dates will not affect processing time**
- 5. Status** – Defaults, this will indicate the status the form is in for the process
- 6. Expense Coordinator Empl ID** - Employee ID number
- 7. Expense Coordinator User ID** - Will default when the magnifying glass is selected based on Exp. Coordinator Empl ID

Section 1- User Information

Section 1 - User Information

*Action (Select one)

User Type (Select one)

Employee ID

*User First and Last Name

*User Email

*GL Business Unit

User's Existing Approver Empl ID (click mag glass to find existing approver)

User's Existing Approver User ID

New Approver Business Unit

New Approver Empl ID

New Approv User ID

8. 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
- Remove User: This action will remove expense access for the user
- 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

9. 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**

10. Employee ID - Employee ID number, leave blank for Non-Employees

11. User First and Last Name - User's Full Name (First and Last)

12. User Email - This email should be the state email for the user. For non-employee's, please list their business email

13. GL Business Unit - Enter the Agency/Department GL Business Unit

14. Business Unit - BU name – will default when prompt (magnifying glass) is selected based on GL Unit above

15. User's 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

16. User's 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


17. New Approver Business Unit - Enter the business unit of the user's new approver


18. New Approver Empl ID - This is the employee ID number of the approver for the user in Section 1


19. New Approv User ID - Enter the new approver's User ID


Section 2 – Chartfield Information

Section 2 - User Chartfield Information

Fund 

Program 

Project 

Class 

This is the chartfield information that default into expense transactions.

20. Fund - Enter the employee's default fund code. **Note: This is a required field**

21. Program - Enter the employee's default program code, if needed

22. Project - Enter the employee's default project code, if needed

23. Class - Enter the employee's default class code, if needed


Section 3 – Approver (Supervisor) Information

Section 3 - Add Approval to User


Will be approving expense transactions for the below users:

Click magnifying glass to find existing approvers

Employee 1


Employee ID 

Employee Name


Existing Approver Employee ID 

Existing Approver Name

Employee 2


Employee ID 

Employee Name


Existing Approver Employee ID 

Existing Approver Name

Employee 3

Employee ID 

Employee Name

Existing Approver Employee ID 

Existing Approver Name

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.

24. Employee ID - Employee ID that the User in Section 1 will be approving expenses for



25. Employee Name - Full name of employee that the User in Section 1 will be approving expenses for

26. Existing Approver Employee 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

27. 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

<p>Section 4 - Expense Coordinator Access Only <i>**This will require a Vision Expense Module Security Signature Authority Form**</i></p> <p>Attachment required (see Instructions for more information)</p> <p><u>Note:</u> If you require Dept ID's for BU 01180, you will not find them listed here, please specify the appropriate Dept ID's needed in the More Information section below.</p> <p style="text-align: center;">If more than one Dept ID but not a range, please list out each Dept ID in the More Information field.</p> <p style="text-align: center;">From Dept ID <input type="text"/> </p> <p style="text-align: center;">To Dept ID <input type="text"/> </p> <p>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</p>
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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>**

28. 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

More Information



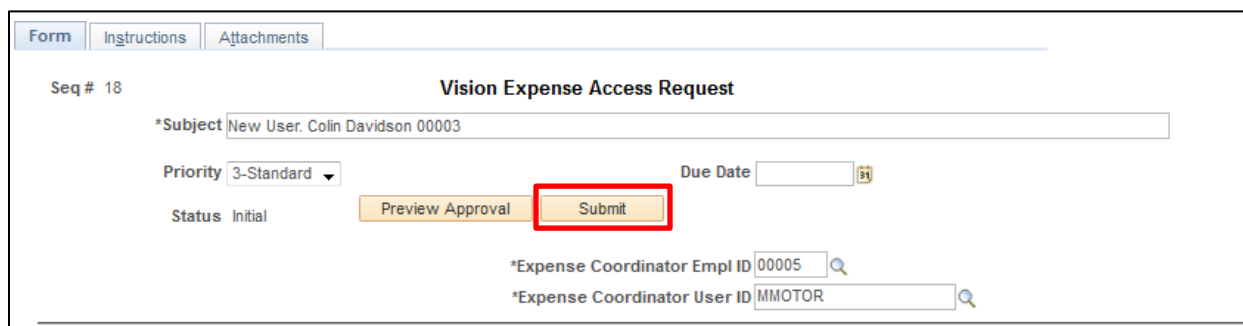
Please add any notes, or any additional information here that will help us better understand your request and process this request efficiently.

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.

29. Click **Save**

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



The screenshot shows a web form titled "Vision Expense Access Request" with a sequence number of 18. The form includes a subject field with the text "New User: Colin Davidson 00003", a priority dropdown set to "3-Standard", and a due date field. The status is "Initial". Two buttons, "Preview Approval" and "Submit", are visible. The "Submit" button is highlighted with a red border. Below the buttons are two search fields for "Expense Coordinator Empl ID" (with value 00005) and "Expense Coordinator User ID" (with value MMOTOR).

30. 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:

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 - 3394	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

1. Click on the [link](#) to open the form

The **form** displays:

Form | Instructions | Attachments

Seq # 3390 **Vision Expense Access Request**

*Subject

Priority 3-Standard

Status Denied

*Expense Coordinator Empl ID

*Expense Coordinator User ID

2. Click [Approver Status](#)

The **Approver Status** page displays:

Vision Expense Access Request

Subject Chartfields

Review/Edit Approvers

1

Vision Expense Access Request: 3390:Denied View/Hide Comments

Denied
Danielle Brochu
Approver for Ex Security Form
05/01/19 - 3:37 PM

Comments

OK

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

The **Comments** box expands:

Vision Expense Access Request

Subject Chartfields

Review/Edit Approvers

1

Vision Expense Access Request: 3390:Denied View/Hide Comments

Denied
Danielle Brochu
Approver for Ex Security Form
05/01/19 - 3:37 PM

Comments
Danielle Brochu at 05/01/19 - 3:37 PM
Hi Garret - This employee already holds these Chartfield(s).

OK

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