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

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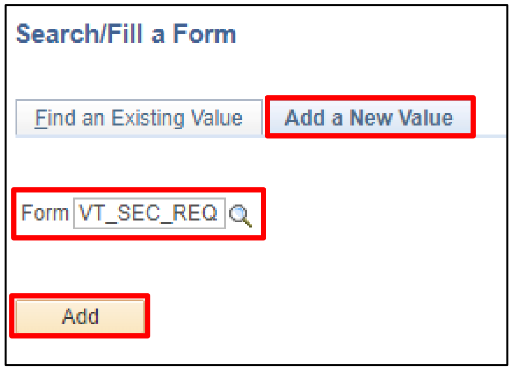
Completing the VISION Module Access Request Form

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

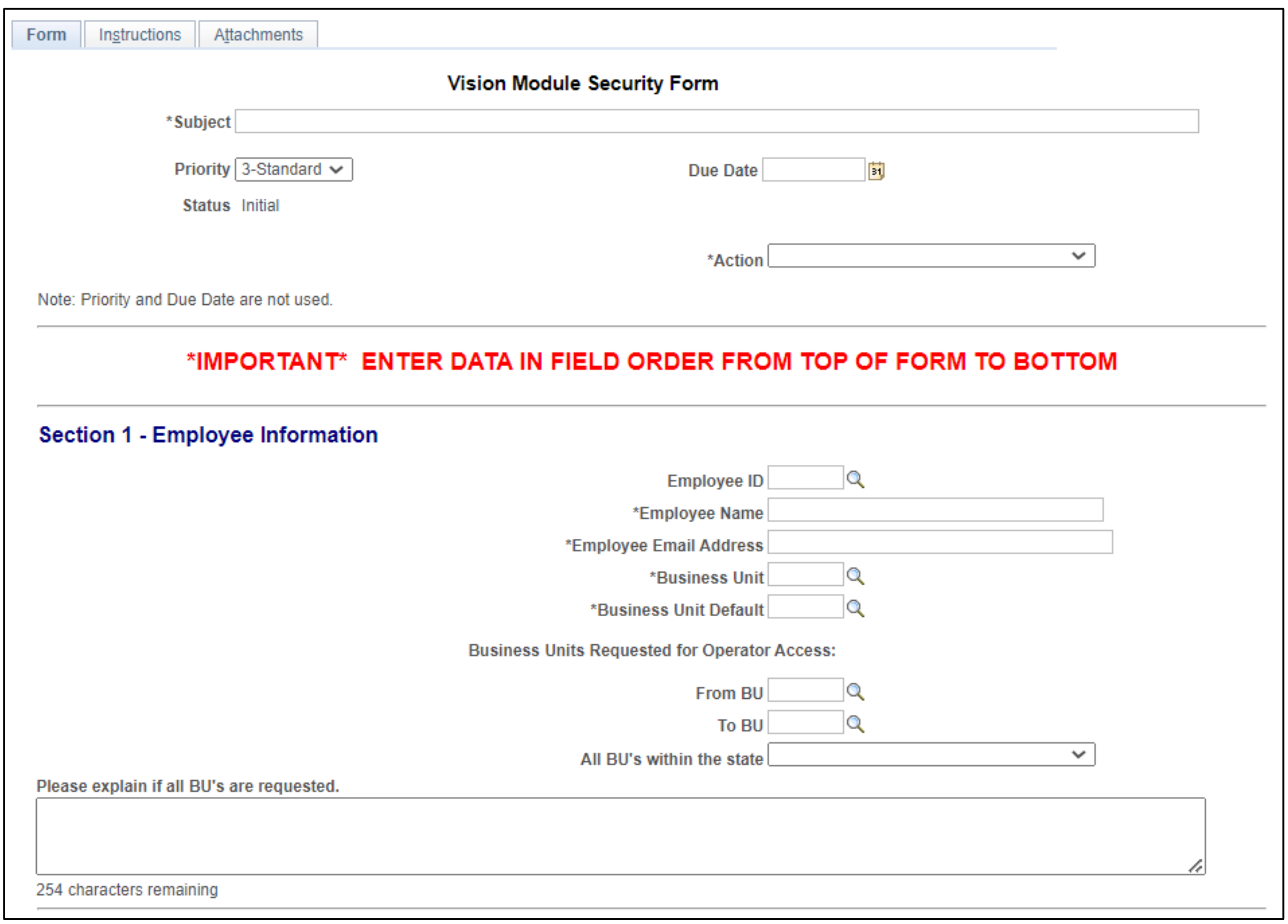
Navigator menu navigation: Module Security Form > Vision Module Security Form

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



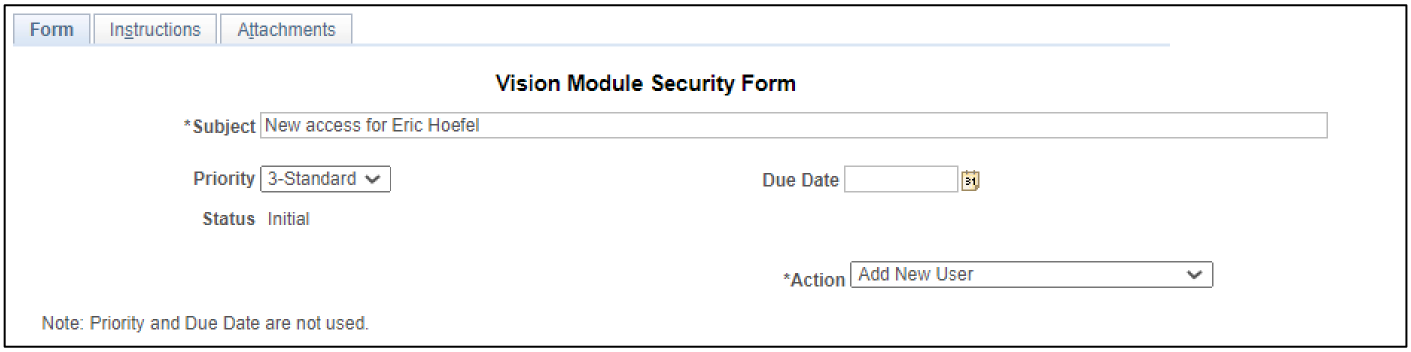
1. **Form -** Enter VT_SEC_REQ
2. Click on **Add**

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


Form | Instructions | Attachments

Vision Module Security Form

*Subject: New access for Eric Hoefel

Priority: 3-Standard

Due Date:

Status: Initial

*Action: Add New User

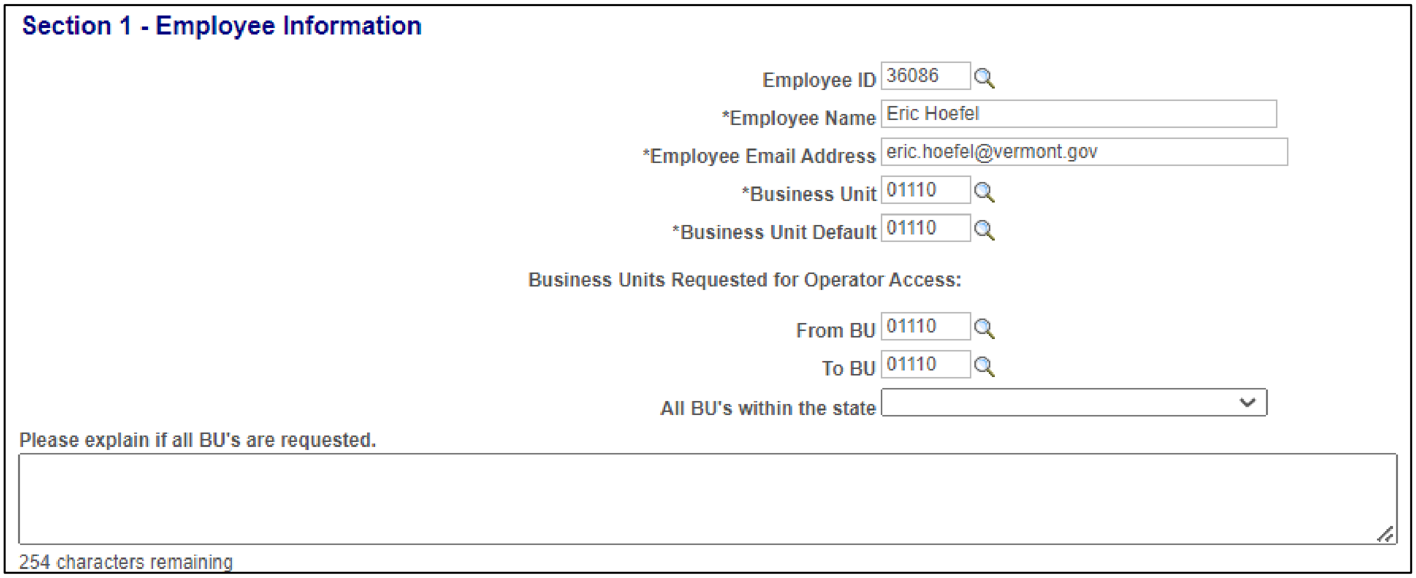
Note: Priority and Due Date are not used.

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

3. **Subject -** Enter the reason/description for this request. (i.e.: John Smith, 12345 newaccess)
4. **Priority -** Accept Default
5. **Due Date -** Enter date that the request is being submitted. Dates entered will not affect processing time
6. **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: If the user currently has module access and you are only adding additional access, select "Y" in Section 7 for all other access to remain the same.

Section 1 - Employee Information


Section 1 - Employee Information

Employee ID 36086

*Employee Name Eric Hoefel

*Employee Email Address eric.hoefel@vermont.gov

*Business Unit 01110

*Business Unit Default 01110

Business Units Requested for Operator Access:

From BU 01110

To BU 01110

All BU's within the state

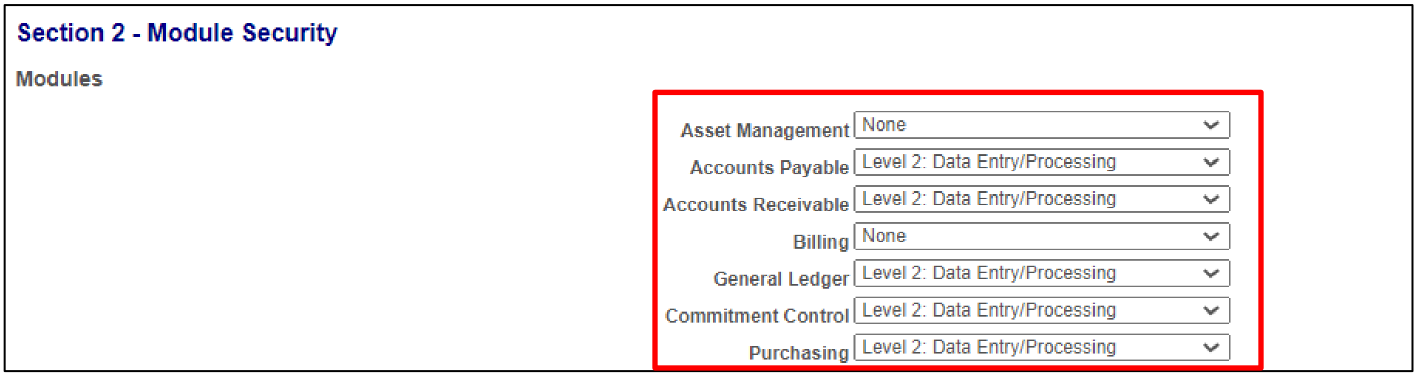
Please explain if all BU's are requested.

254 characters remaining

7. **Employee ID # -** Enter Employee ID number for all state employees. Leave blank for Non-employees
8. **Employee Name -** Employees Full Name. (First and Last)
9. **Employee Email Address -** This email should be the state email for the user. For non-employee's, please list their business email
10. **Business Unit -** Enter the Agency/Department GL Business Unit
11. **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
12. **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

      Note: If a range does not work for the BU access the user requires, please list each BU in the More Information section at the bottom of the form.
    - **All BU's:** If a user should have ALL business units you will indicate that here using the dropdown menu of "All Business Units." You must enter an explanation of why all BU access is necessary for this employee in the text field

Section 2 - Module Security



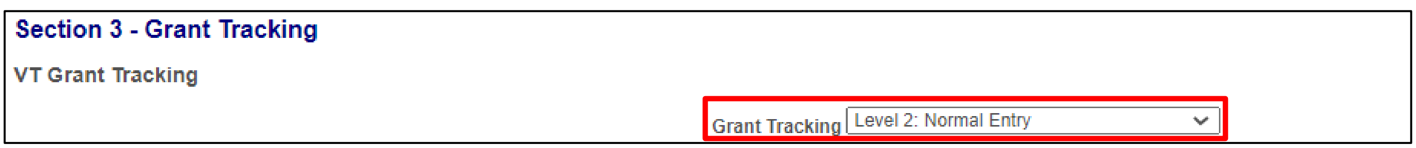
Section 2 - Module Security

Modules

Asset Management	None
Accounts Payable	Level 2: Data Entry/Processing
Accounts Receivable	Level 2: Data Entry/Processing
Billing	None
General Ledger	Level 2: Data Entry/Processing
Commitment Control	Level 2: Data Entry/Processing
Purchasing	Level 2: Data Entry/Processing

13. **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 Modules:
        - **None:** If no access is required
        - **Level 1:** Display only
        - **Level 2:** Data Entry/Processing
    - PO Module only:
        - **Level 3**; Level 2 access PLUS approval
        - **PO Central Purchasing Only:** Purchasing Agent Access

Section 3 - Grant Tracking



Section 3 - Grant Tracking

VT Grant Tracking

Grant Tracking: Level 2: Normal Entry

14. **VT Grant Tracking:** This is the VISION module for sub-recipient grant tracking. If the userrequires 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.

Note: You must complete and save the form before you can add attachments.

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

Please use magnifying glass to select value.

Requisition Approval Y/N (needs PO Level 3)	N
Contract Approval Y/N (needs PO Level 3)	N
Purchase Order Approval Y/N (needs PO Level 3)	N
Accounts Payable Approval (Y/N)	Y
Direct Journal Approval (Y/N)	N
GL Journal Approval (Y/N)	N
Supplier Add/Update Request Form (Y/N)	Y
Chartfield Request Form (Y/N)	N
VISION Module Security Request Form (Y/N)	N

15. 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
- **Supplier Update Request Form** - This gives the user access to the Supplier Update Request Form, where they can request changes to existing 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 – Additional Approval Roles - Workflow

Section 5: Additional Approval Roles
Workflow

Please use magnifying glass to select value.

A/R Write-Off Approval (Y/N)	N
Budget Journal Approval (Y/N)	N
Billing Credit Invoice Approval (Y/N)	N
GL Chartfield Approval (Y/N)	N

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

- **A/R Write-Offs -** This will place the user into a workflow "pool" of permitted approvers who can 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 -** Selecting this box will place the user into a workflow "pool" of permitted approvers who can approve Chartfield change requests at the department level prior to being sent to Finance for final approval.

  Note: This access is set-up only for specific department

Section 6 - Interfaces

Section 6: Interfaces
Interface Access

Please use magnifying glass to select value.

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

17. Interfaces - In this section you can grant users access to delivered interface tolls

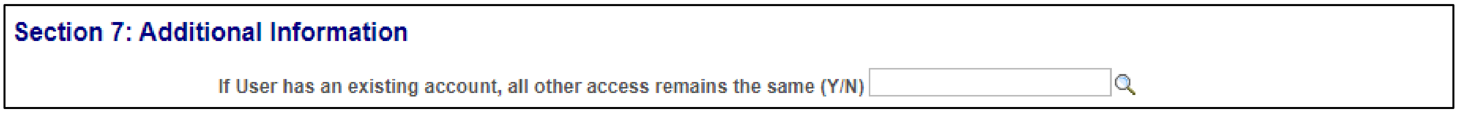
- **Billing Spreadsheet -** This allows a user access to upload large volumes of billing data into the Billing Module

  Note: Department must be set up to use the Billing module <u>before this access can be given</u>

- **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

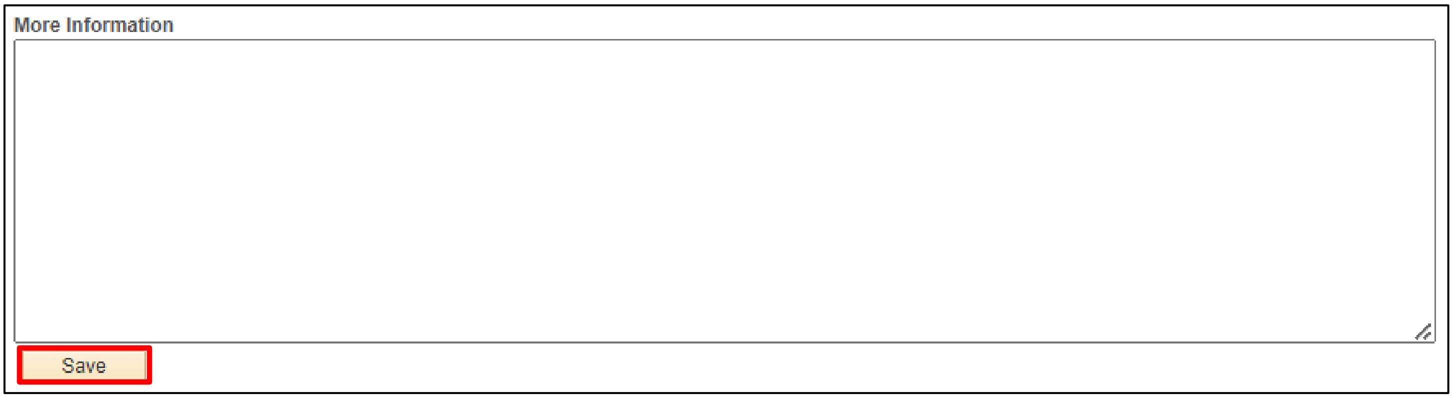
  Note: Only available to specific department

Section 7: Additional Information



18. **Access for Users with an existing account -** If the User has existing module access, select "Y" to indicate that all other access remains the same. This saves you from having to complete the entire form when making a minor change. Select "N" if existing access is to be replaced

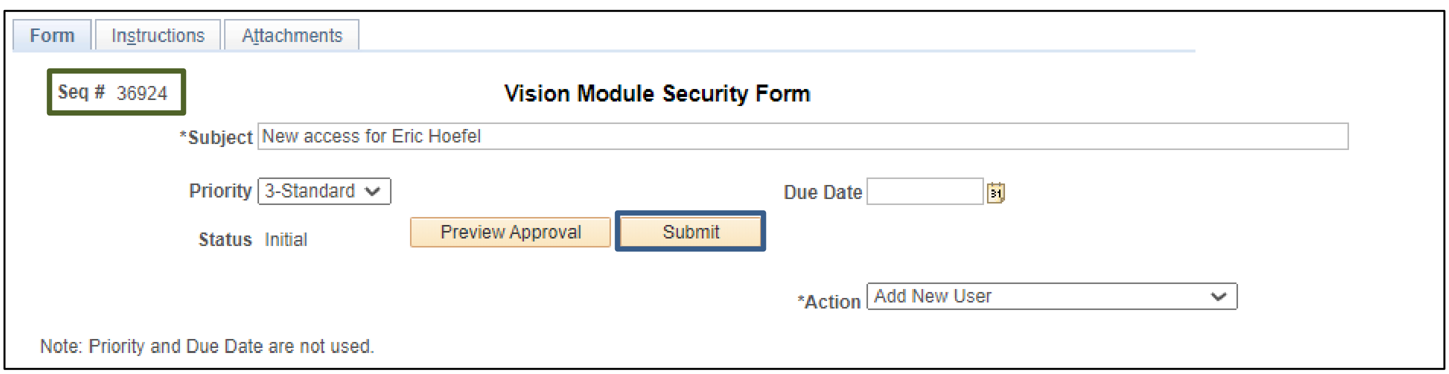
More Information



19. Use this area to add ANY additional information that will help us process your request efficiently

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

20. Click **Save**
21. **Scroll** back to the top of the form



22. A Sequence Number has been assigned - click **Submit**. 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; GLUnit; ID; Employee Name; Action Requested; Date Submitted; Status; Date Last Updated; Reviewer Comments.

VT_MODULE_SEC_ 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