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

February 2024

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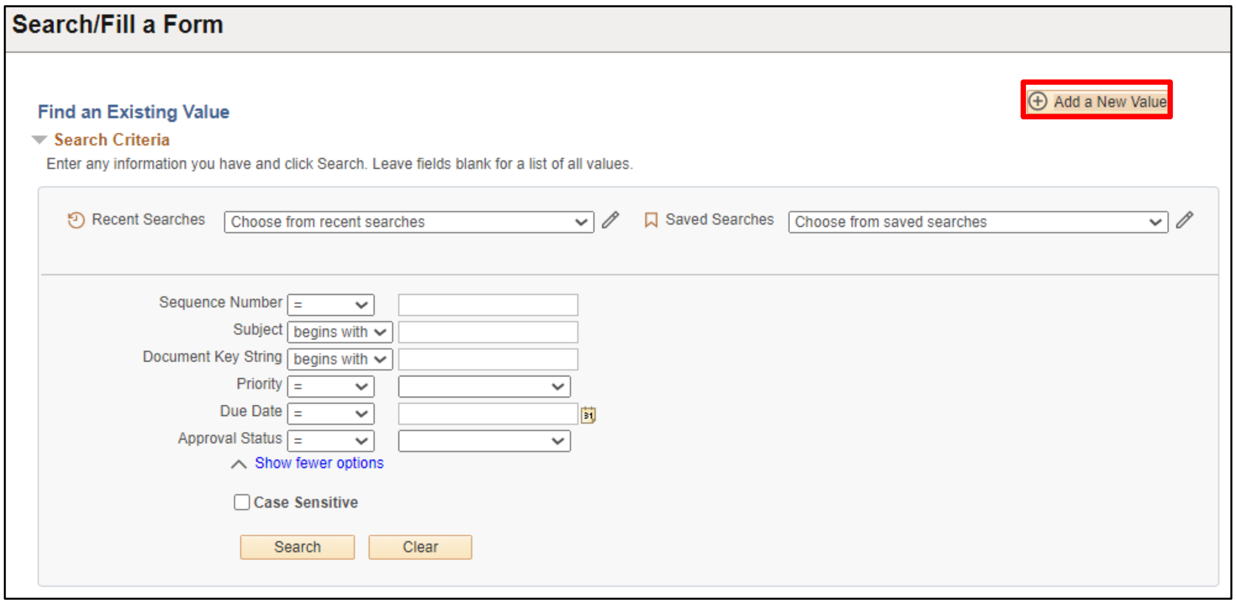
Completing the VISION Module Access Request Form

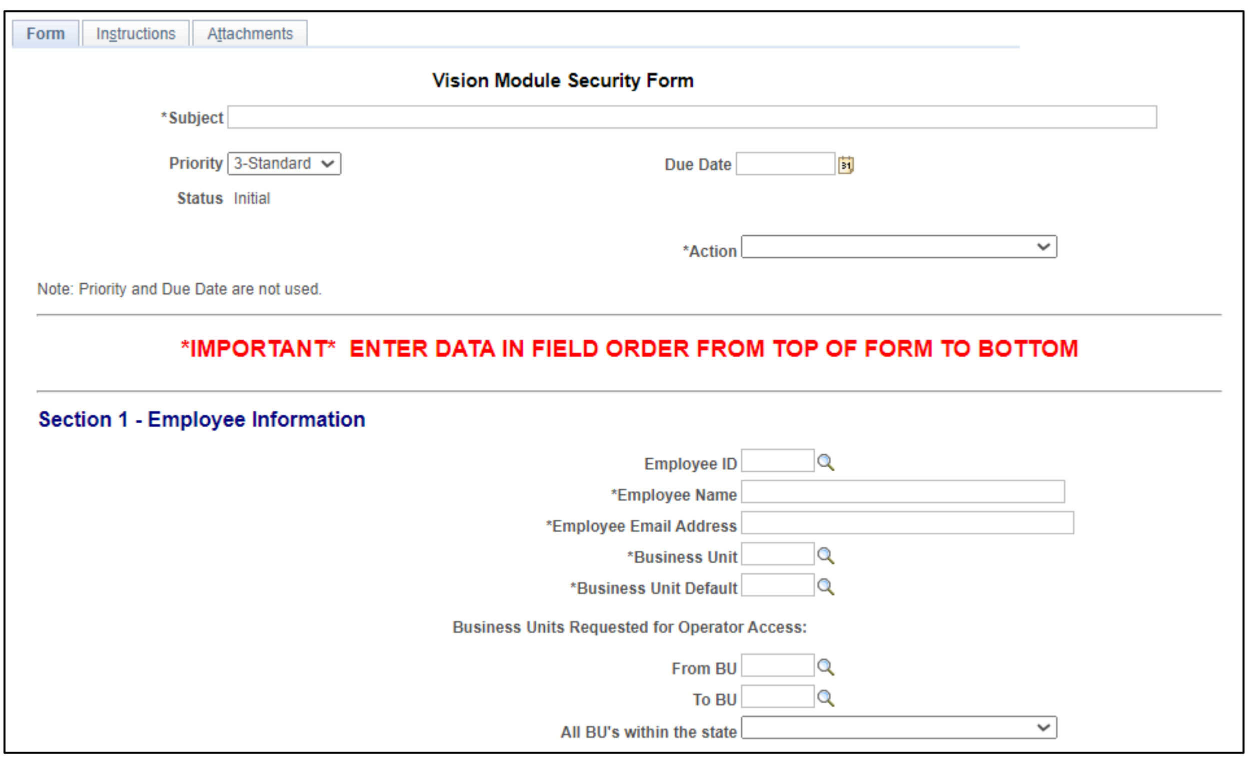
WorkCenter navigation: Any Module WorkCenter > Links pagelet > Other Links > VISION Module Security Form

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

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



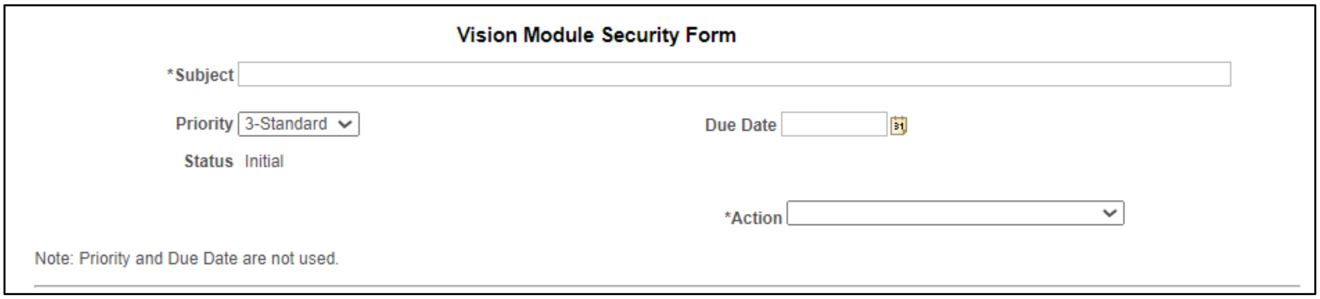
The **Vision Module Security Form** displays:



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.

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



Vision Module Security Form

*Subject

Priority 3-Standard

Due Date

Status Initial

*Action

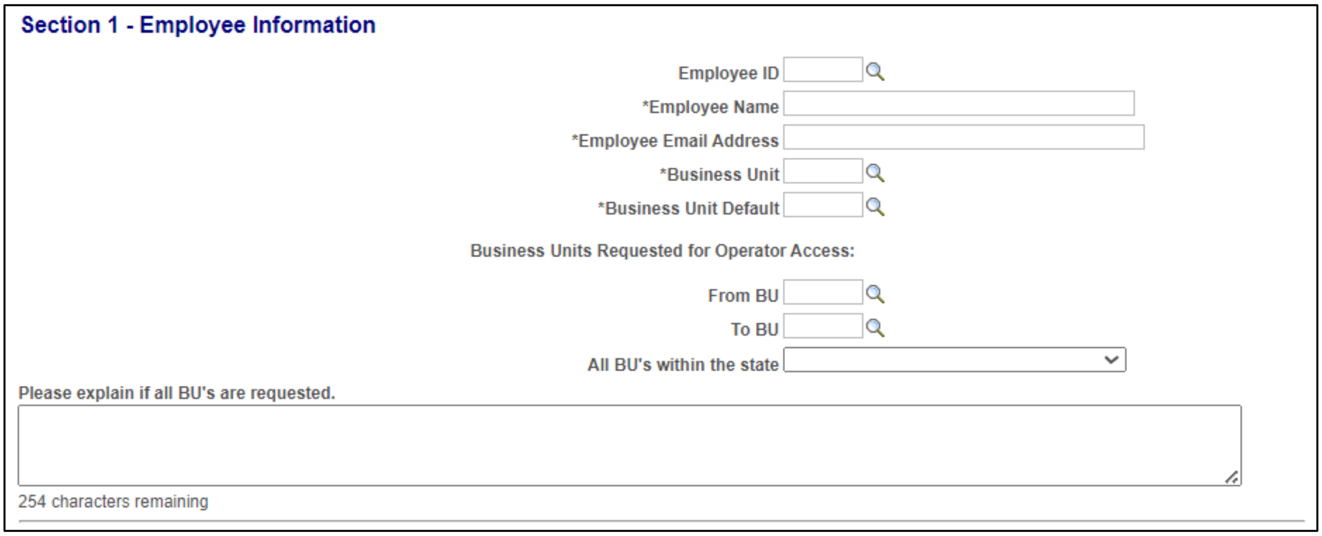
Note: Priority and Due Date are not used.

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

*Business Unit Default

Business Units Requested for Operator Access:

From BU

To BU

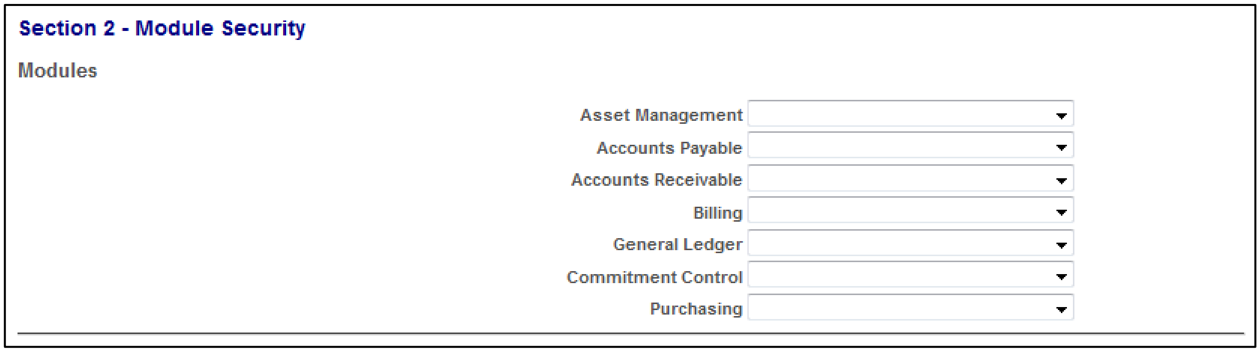
All BU's within the state

Please explain if all BU's are requested.

254 characters remaining

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. **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
10. **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"
11. **Please explain… -** Enter an explanation of why all BU access is necessary for this employee

Section 2 – Module Security

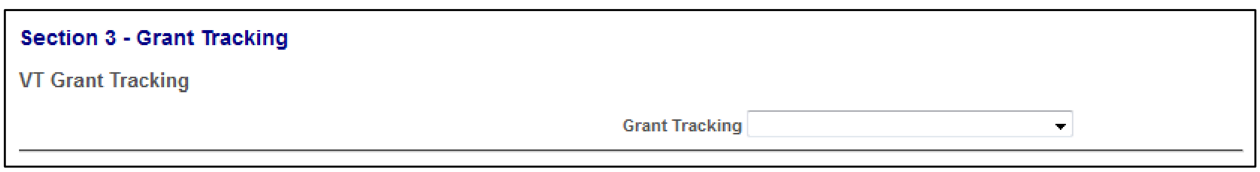

Section 2 - Module Security

Modules

Asset Management
Accounts Payable
Accounts Receivable
Billing
General Ledger
Commitment Control
Purchasing

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


Section 3 - Grant Tracking

VT Grant Tracking

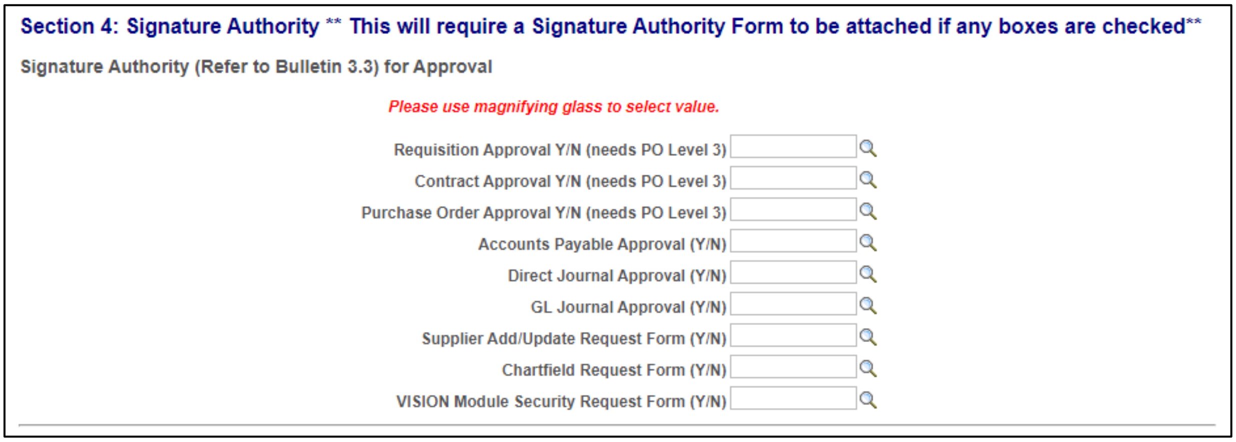
Grant Tracking

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 **<u>attached using the Attachments tab</u>** 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

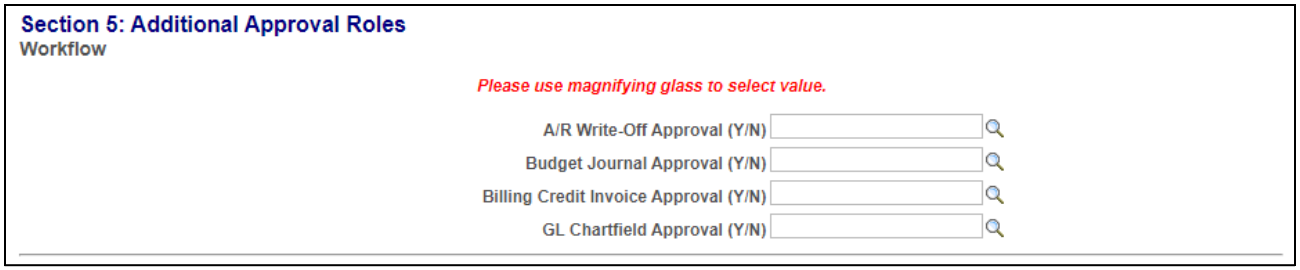
Please use magnifying glass to select value.

Requisition Approval Y/N (needs PO Level 3)
Contract Approval Y/N (needs PO Level 3)
Purchase Order Approval Y/N (needs PO Level 3)
Accounts Payable Approval (Y/N)
Direct Journal Approval (Y/N)
GL Journal Approval (Y/N)
Supplier Add/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/Update Request Form** - This gives access to the Supplier Add Request Form (formerly VISION Vendor requests)
- **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



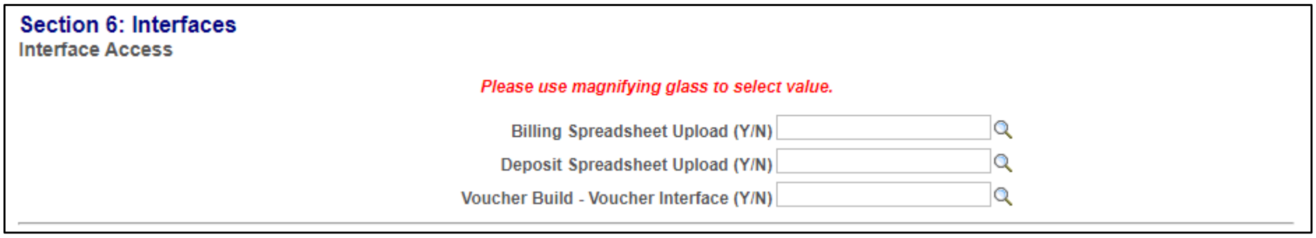
Section 5: Additional Approval Roles
Workflow

Please use magnifying glass to select value.

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

15. **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 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: Interfaces


Section 6: Interfaces

Interface Access

Please use magnifying glass to select value.

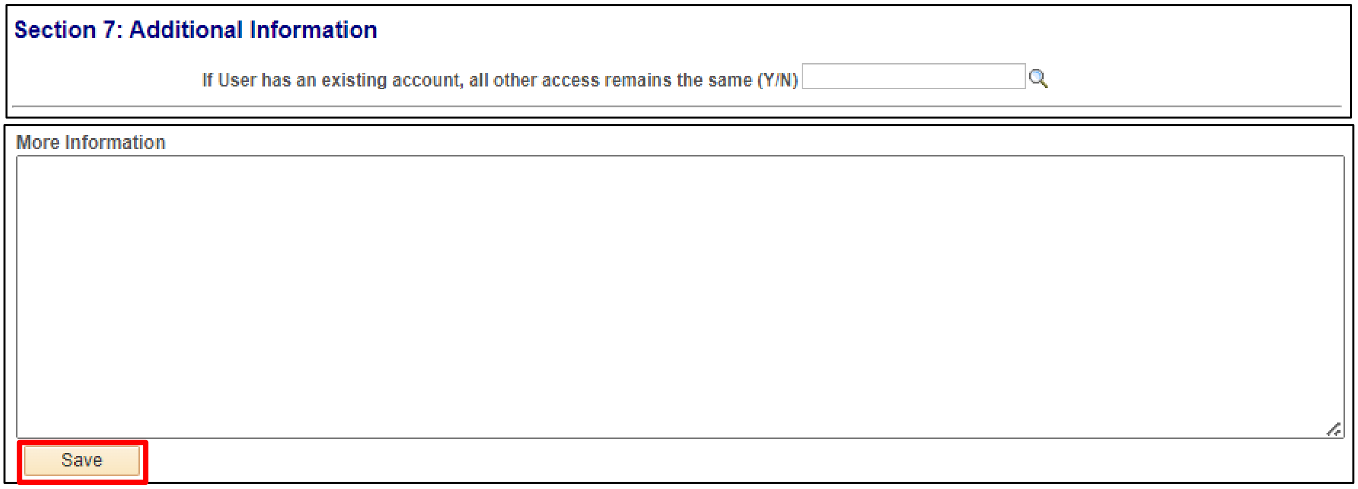
Billing Spreadsheet Upload (Y/N)

Deposit Spreadsheet Upload (Y/N)

Voucher Build - Voucher Interface (Y/N)

16. **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 7: Additional Information



17. User has an existing account, all other access remains the same - Select Yes or NO

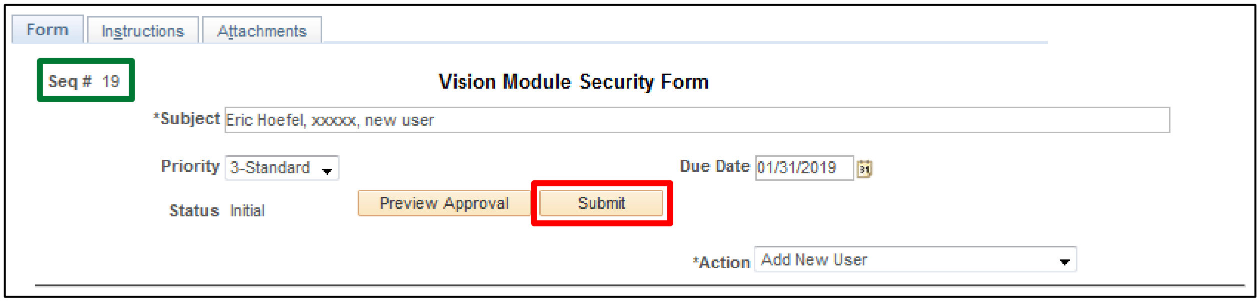
18. Comments/More Information

- 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 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:

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