

Hyperion Budget & Planning (CoogPlan) Instructions

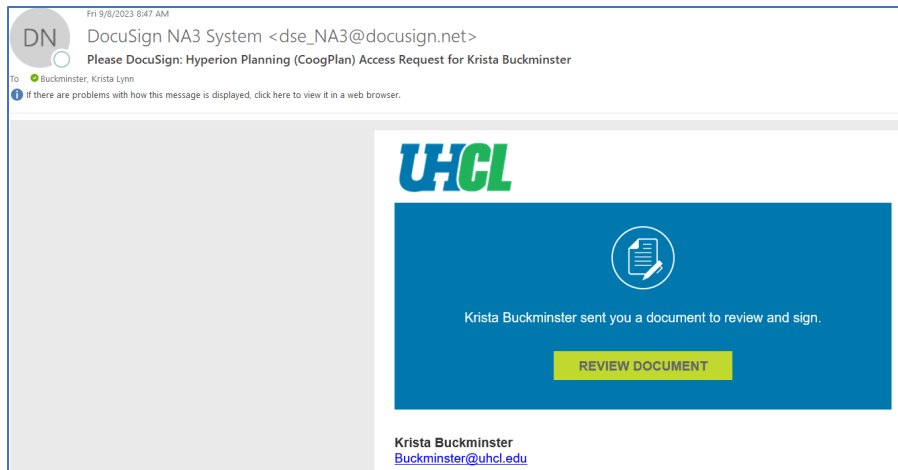
Instructions for Requesting Employee requiring access to Hyperion:

1. Email Planning and Budget (PBO) at BudgetOffice@UHCL.edu to request Hyperion access. Include the following information in the email:

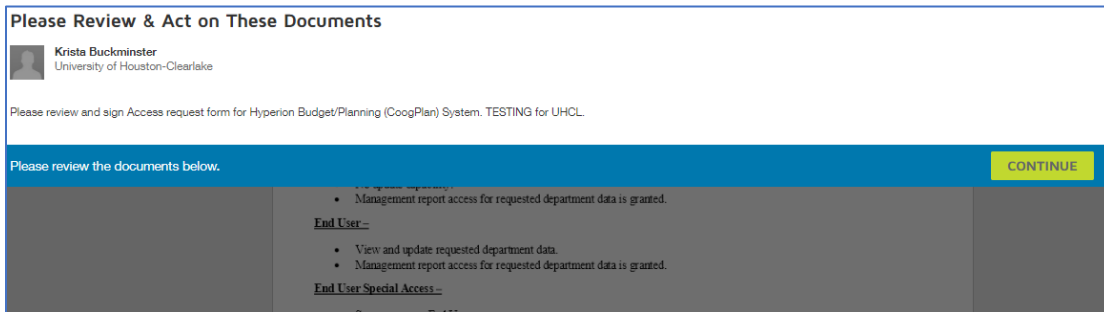
- Requesting Employee's:
 - Name
 - Email Address
 - Position Title
 - User Name (Windows Login)
 - Employee ID (PS Employee ID number)
 - Department Name and Code
 - Adding access or Modifying existing access
 - Division/Unit or Department node access that is needed
 - Provide the "Division Tree" node if requesting for a whole division.
 - Provide the "Unit Tree" node if requesting an area/unit.
 - Provide the "Department ID" if requesting various department codes that are not all in a "Unit Tree" or "Division Tree" node.
- Supervisor's Name & Email Address
- College/Division Business Administrator's Name & Email Address
- Clarify if this is new or an update to existing access.

Verify all information is correct prior to sending the email, otherwise it will delay the approval process.

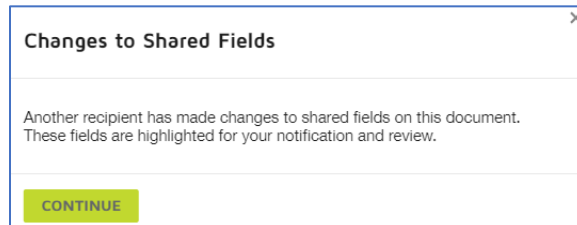
2. Once Planning and Budget receives the request for access, they will initiate the form for Hyperion access. An email from DocuSign will be sent to the Requesting Employee.



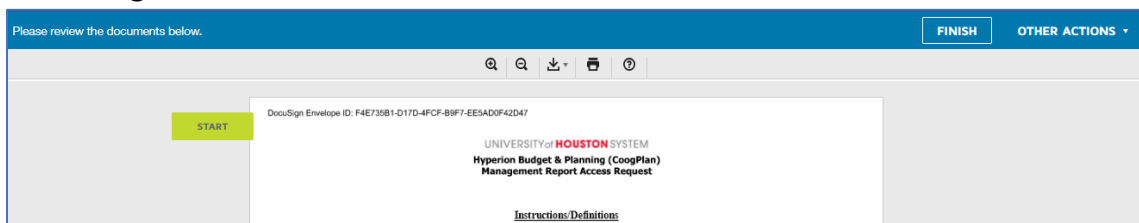
3. Click on the green “Review Document” box from the email.
4. DocuSign should automatically open up.
5. Click the green “Continue” box in DocuSign.



6. If a “Changes to Shared Fields” box pops up, click the green “Continue” box.



7. Click the green “Start” box.



8. **Verify that all the light red boxes are correctly filled in** with your information before proceeding. Refer to the instructions on page 1 for terminology of field names. If any changes need to be made, the fields are still editable.

UNIVERSITY of HOUSTON SYSTEM
Hyperion Budget & Planning (CoogPlan)
Management Report Access Request

UH ___ UHCL x UHD ___ UHV ___

Applicant Information:

Employee: 09/08/2023
Name Title

User Name: EMPL ID: Email:


College/Department Name & ID:

Access Action: ADD (New Users Only) MODIFY

List desired DEPT ID below in boxes provided and check desired security role or action.

Department ID <small>(Example: HXXXXX CXXXXX DXXXXX VXXXXX)</small>	Access Type
<input type="text" value="C0000"/>	<input type="text" value="Budget Officers Group"/>

NEXT

9. Click the green "Next" box after verifying information.
10. Click the green "Next" box to get to the sign function.
11. Click the little "Sign" Icon box  and sign the document.
12. The signature will then populate on the form.
13. Click the green "Finish" box.

Done! Select Finish to send the completed document. FINISH

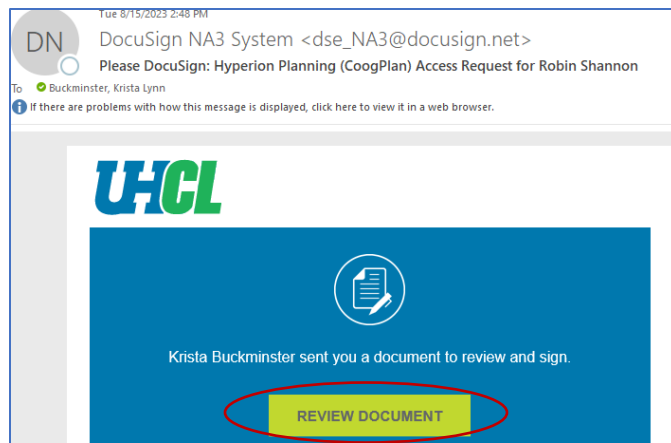
UH/UHS Budget Office Review/Approvals

14. Click "No Thanks," if the log in to DocuSign box pops up.

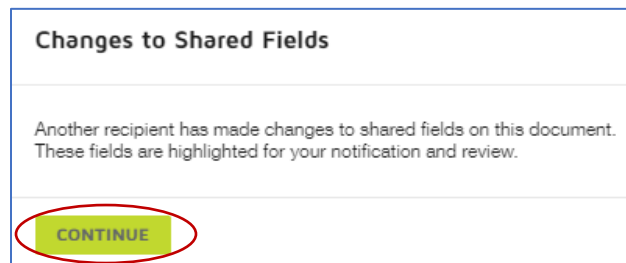
Please note: the request for Hyperion access will follow a workflow path that will proceed to the supervisor and then the CBA/DBA. Please inform them to be on the lookout for an email from DocuSign.

[Instructions for Signers \(Supervisor & CBA/DBA\)](#)

1. An automated email will be sent from DocuSign. Click on Review Document from the email.



2. Click the green “Continue” Box to begin the signing process.
3. A pop-up box could pop up stating that Changes to shared Fields exist. Click Continue.



4. Click on the green Box “Start” to review document before signing.
5. Review the form, and populate your name and Title if required, and then click the sign icon. Verify that all the information is correct on the form, including your Name, Title, Initials, and signature. If any changes need to be made, the fields are still editable.

User Name: Shannon EMPL ID: 8013886 Email: shannon@uhcl.edu

College/Department Name & ID: Planning and Budget C0129

Access Action: ADD (New Users Only) MODIFY

List desired DEPT ID below in boxes provided and check desired security role or action.

Department ID (Example: HXXXX; CXXXX; DXXXX; VXXXX)	Access Type
C0084	End User Special Access ▼
	-- select -- ▼
	-- select -- ▼
	-- select -- ▼

Department Approvals Required - Signature Applied - SignHere

Supervisor/Manager: Krista Buckminster Budget Mgr: Krista Buckminster 8/15/2023

College/Division Business Administrator: _____

Budget Office Approval: (Each respective campus Budget office)

Budget Office Representative: _____

6. Click the green “Finish” button once the name and signature have been correctly applied.
7. To save a copy of the form that you just signed, you can opt to print the form and save as a PDF. This is not required, and once the form is completed PBO gets a copy of the completed form.

PBO Instructions Only to start the approval process for access

1. Log into DocuSign Production. [DocuSign Login - Production](#)
 - a. Input email address and click Next.

Log in to DocuSign

Enter your email to log in.

Email *

NEXT

[Sign Up for Free](#)

- b. Click on “Use company login” that is in a blue box.

Log In

← buckminster@uhcl.edu

Use company login

Use Other Login Options

- c. Sign in to UHCL account, by clicking on the same email address entered for DocuSign.

UHCL

Pick an account

buckminster@uhcl.edu

Use another account

- d. Enter Username (without @uhcl.edu) and password.

UHCL

buckminster

.....|

Sign in

- e. Click Sign in.
 - f. Follow the necessary steps for the duo process in order to sign in to DocuSign.
2. Once signed in to DocuSign, it will open on the home page.
 3. Click on Templates at the top.

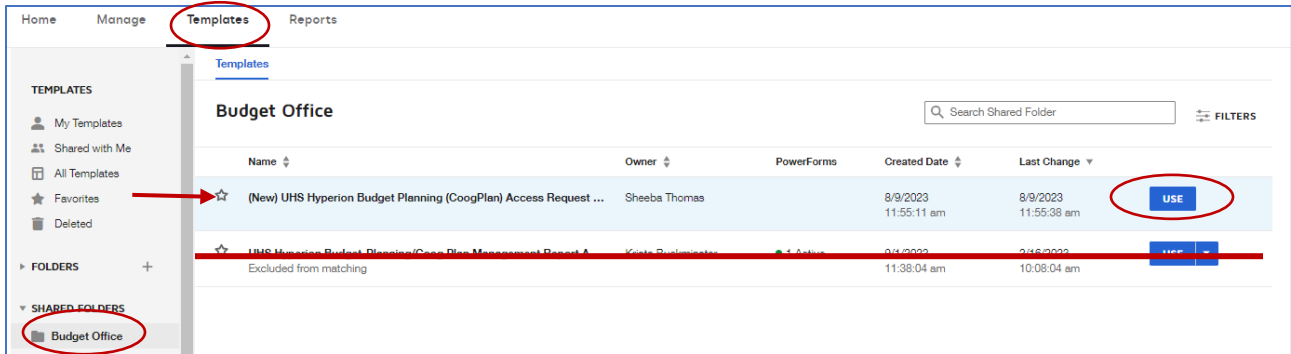
DocuSign eSignature Home Manage **Templates** Reports


Signed by: *Krista Buckminster*
9A8B1E653401427...

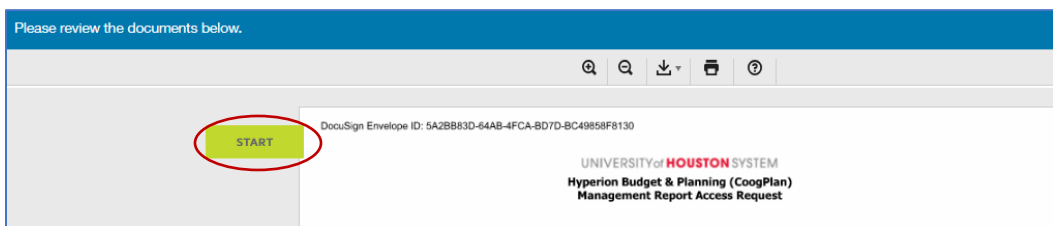
Last 6 Months


0 Action Required	1 Waiting for Others
-----------------------------	--------------------------------

- Go to the folder where the “Hyperion CoogPlan Access” form is located in the account. In this case, it is saved under a folder that was created called Budget Office for my account.



- Click on the blue box called “Use” to the right of the Hyperion (CoogPlan) Access Request form.
- Populate the “Add Recipients” fields that was provided from the email for Hyperion Access. Do not start this unless all information is provided from requesting employee.
 - The Initiator is always someone from PBO.
 - The UHS/UH Budget Office Representative will be UH Budget Office at email address uhbudget@uh.edu.
- Click Send after all recipient fields are populated. Please note that fields 5,6,8 and 10 are auto-populated and cannot be changed.
- Click to sign it Now. A DocuSign email will generate to the initiator (PBO).
- A screen will pop up asking to “Review & Act on these Documents.” Click the “Continue” button. 
- Click on the “Start” button



- Input all required data on the form (supplied from email):
 - Click on the  radio button.
 - Input **Employee Name** (First & Last Name), **Title** and **Request Date** (Current Date) of the employee requesting access.

- Input **User Name** (Windows Sign-in ID), **Empl ID** (PS Employee ID number), and **Email** for the requesting employee.
- **College/Department Name & ID** is the requesting employee's Department name and 5-digit department code that begins with the letter "C".
- Access Action: Select "**Add**" if you are requesting new access, select "**Modify**" if an update to existing access is needed.
- **Department ID** field
 - Provide the "Division Tree" node if requesting for a whole division.
 - Provide the "Unit Tree" node if requesting an area/unit.
 - Provide the "Department ID" if requesting various department codes that are not all in a "Unit Tree" or "Division Tree" node.

The first row is required, the other 3 rows are optional if additional departments are needed for the request of access.

- **Access Type** (refer to snapshot below on next page)
 - CBA/DBAs – select "End User Special Access"
 - Unit/Division Leaders – select "Budget View Only"
 - Cost Center/Department Managers – select "Budget View Only"
 - PBO –select "Budget Officer Group"

UNIVERSITY of HOUSTON SYSTEM
Hyperion Budget & Planning (CoogPlan)
Management Report Access Request

Instructions/Definitions

Budget View Only –

- View access for requested department data.
- No update capability.
- Management report access for requested department data is granted.

End User –

- View and update requested department data.
- Management report access for requested department data is granted.

End User Special Access –

- Same access as End User.
- Access granted during Merit Phase.

Budget Officer Group –

- Limited to Budget office Staff at the respective campuses.
- This access provides full set of reports, including management reports.

Management Reports –

- Provides access to full series of management reports for the requested departments.

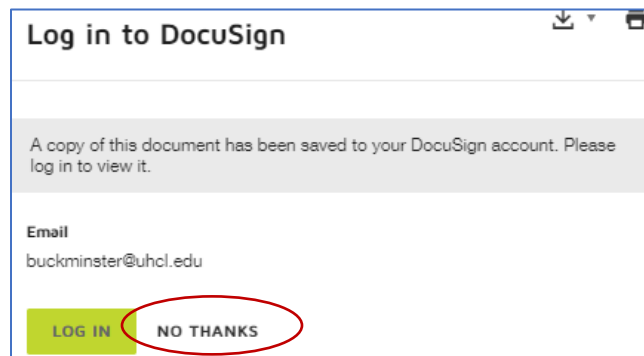
Remove Access –

- Removes full access to specified departments.

Note –

- Once all parties have reviewed and signed the form, Initiator will get notification stating “**Your document has been completed,**” the user will have to view the completed document to see if access has been approved or denied. If the access is denied the form has to be filled out again.

12. After all information has been entered, click the Finish button. *If all required fields are not filled out, it will not allow you to click the finish button.*
13. Click “No Thanks” if the box below pops up.



14. The form will now go through the workflow process for all required signatures.