# University of Houston Z Clear Lake

Planning and Budget

# Hyperion Budget & Planning (CoogPlan) Request Form

# Instructions for Requesting Employee

- 1. Go to the Planning and Budget Office website located here
- 2. Click on Resources and Forms
- 3. Under the Forms section click on the Hyperion Budget & Planning (CoogPlan) Request Form
- 4. DocuSign Power Form Signer Information will display for the form.
  - a) Provide the following details (confirm that all information is accurate because DocuSign will automatically send emails to these individuals when it is their turn to sign.
  - 1) Name of the employee requesting access and their email address
  - 2) Name of the Requesting Employee's Supervisor and their email address
  - 3) Name of the College/Division Business Administrator and their email address
- 5. Click on the "Begin Signing" tab at the top after filling out the information in step 4.
- 6. A screen will pop up asking for the requesting employee to "Review a& Act on these Documents." Click on the "I agree to use electronic records and signatures" check box,

and then click the "Continue" button.

- CONTINUE
- 7. Click on the "Start" button
- 8. The following details need to be populated into the form:

1) Click on the UHCL Oradio button

START

- 2) Input your Title and Request Date
- 3) Campus ID is the requesting employee's Alphabetic ID for PeopleSoft and Windows Sign-in ID
- 4) EMPL ID is the requesting employee's PeopleSoft ID number (numeric)
- 5) **Email** is the requesting employee's email address
- 6) **College/Department Name & ID** is the requesting employee's Department name and 5-digit department code that begins with the letter "C"
- 7) Access Action: Select "Add" if you are requesting access, select "Change" if you need to update current access, and select "Delete" if you no longer need access.

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- 8) Department ID, Hyperion Budget & Planning (CoogPlan), and Other Requests Table:
  - Department ID provide all departments that you need access to.
    Can list out by department or provide Tree range node.
  - Hyperion Budget & Planning (refer to instruction sheet of the form 1<sup>st</sup> page
    - **a)** CBA/DBAs select End User Special Access
    - **b**) General Accounting select Budget View Only
    - **C)** PBO Budget Officer Group
- 9. After all information has been entered by the Requesting Employee, click on the "Sign" Icon
- 10. Once the document is signed, click on the "Finish" icon
  - If all required fields are not filled out, it will not allow you to click the finish button.
- 11. The document will then go through the approval process for all required signatures.

#### Instructions for all Signers

1. SIGNING THE TEMPLATE INSTRUCTIONS FOR ALL

# a. REVIEW THE DOCUSIGN EMAIL -

Open the email and review the message from the sender. Click REVIEW DOCUMENT to begin the signing process.

# b. AGREE TO SIGN ELECTRONICALLY -

Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click CONTINUE.

## c. START THE SIGNING PROCESS -

- i. Click the START tag on the left to begin the signing process. You are taken to the first field requiring action.
- ii. Enter all the required fields.
- iii. Click the SIGN tag. You are asked to Adopt Your Signature.

## d. VERIFY YOUR NAME -

Verify that your name and initials are correct. If not, change them as needed.

## e. ADOPT A SIGNATURE –

- Accept the default signature and initial style, or
- Click SELECT STYLE, and select a signature option.

## f. SAVE YOUR SIGNATURE -

Click ADOPT AND SIGN to adopt and save your signature information and return to the document.

## g. CONFIRM SIGNING -

When you finish clicking all signature tags in the document, confirm signing by clicking FINISH.

Adobe File link: https://acrobat.adobe.com/link/track?uri=urn:aaid:scds:US:a7408e4d-7cd4-3563-a395-f3ca68733805