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. 

7. Click on the **"Start"** button 

8. The following details need to be populated into the form:
   1) Click on the 

 radio button
   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.
   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 1st page)
   - **b.** CBA/DBAs – select End User Special Access
   - **c.** General Accounting – select Budget View Only
   - **d.** 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 not all required fields are 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.