

Hyperion Planning – Campus Wide Budgeting

Instructions: User Access Request Form

The accompanying Excel workbook has two sheets. These worksheets should be used for new access requests and requests to update access.

1. By department: Use this sheet to designate users who will have access to all PGs within the DeptID - **RECOMMENDED**
2. By PG: Use this sheet to designate users who will only have access to a subset of PGs within a single DeptID.

Generally, we would expect the users for IS and Workforce to be similar as the flow between these two plans will be seamless to users and the combination of the two plans will be the unit's annual budget.

Using the form:

Hyperion Planning - Campus Wide Budgeting							
User Access Request Form - Department							
User Information							
Employee Name:							
CWL ID:							
UBC E-Mail:							
Type of Request							
Please mark (x) one of the boxes							
<input type="checkbox"/>	New Access Request						
<input type="checkbox"/>	Update to Existing Access						
Access Information							
No	VP	Faculty / Admin Unit	DeptID	Department	IS	Workforce	Transfers
Ex.	VP FRO	Comptroller	321000	Budget Office	Plan	Plan	Yes
1							
2							
3							

Steps to complete

1. Complete the **User Information** section. This information is required for the systems group to identify and provision the user to Hyperion.
2. Complete the **Access Information** section:
 - a. Using the drop-down menus, establish the type of access each individual should have
 - i. IS: Access will be provisioned for Income Statement Planning
 - ii. Workforce: Access will be provisioned for Salary planning to be included in the Income Statement plan
 - iii. Transfers: Access will be provisioned for the user to initiated GPO funding transfers from this department or PG
 - b. IS and Workforce access can be granted as:

- i. Plan: Provisions write access
- ii. Read: Provisions read-only access
- iii. Blank: No access
- c. Transfers access can be granted as:
 - i. Yes: Can initiate GPO funding transfers out and accept funding transfers in
 - ii. No: Cannot initiate funding transfers out or accept funding transfers in

Note: When you provision access to an entire department, there is no need to repeat the user on the PG access form, access will automatically be granted based on department access.

Research PGs

The research budget will be prepared at the Faculty/AVP, therefore please do not identify users by individual Research PG.

Please submit completed forms to budget@finance.ubc.ca . Please Cc your manager on all access requests.