



Processes and Procedures

Access Request for Enterprise Performance Management

TYPE	Process
ID	WYOPNP-1
Title	Access Request – Enterprise Performance Management
Version	2.0
Status	Published
Release Date	2024-08-01
Author	Meredith Bickell, Senior Director of Systems & Business Optimization

Purpose:

WyoCloud Enterprise Performance Management (EPM) is used to build budgets by budget managers across campus. This document outlines the process of requesting campus user access to this system.

Scope:

Access is limited to a single budget manager in each area.

Once access is approved, the budget manager must complete the Enterprise Performance Management online training, which the new budget manager will need to self-enroll within WyoCloud Learning.

Summary:

Information about the budgeting process can be found in the knowledge base under WyoCloud > [Enterprise Performance Management](#).

A Service Request ticket must be submitted to start the access request process.

Details:

Part I: UW Business Manager Submits [Service Request](#)

Access to WyoCloud Enterprise Performance Management

1. Title *
 - a. Enter: Access to EPM
2. Requestor *
 - a. Defaults to user
3. Acct/Dept *
 - a. Defaults to Department of the Requestor
4. Request Type *
 - a. Select: Request for Access
5. Application to request access for*
 - a. Select: Enterprise Performance Management
6. Subdivision/Organization/Department*
7. Type of Request*



Processes and Procedures

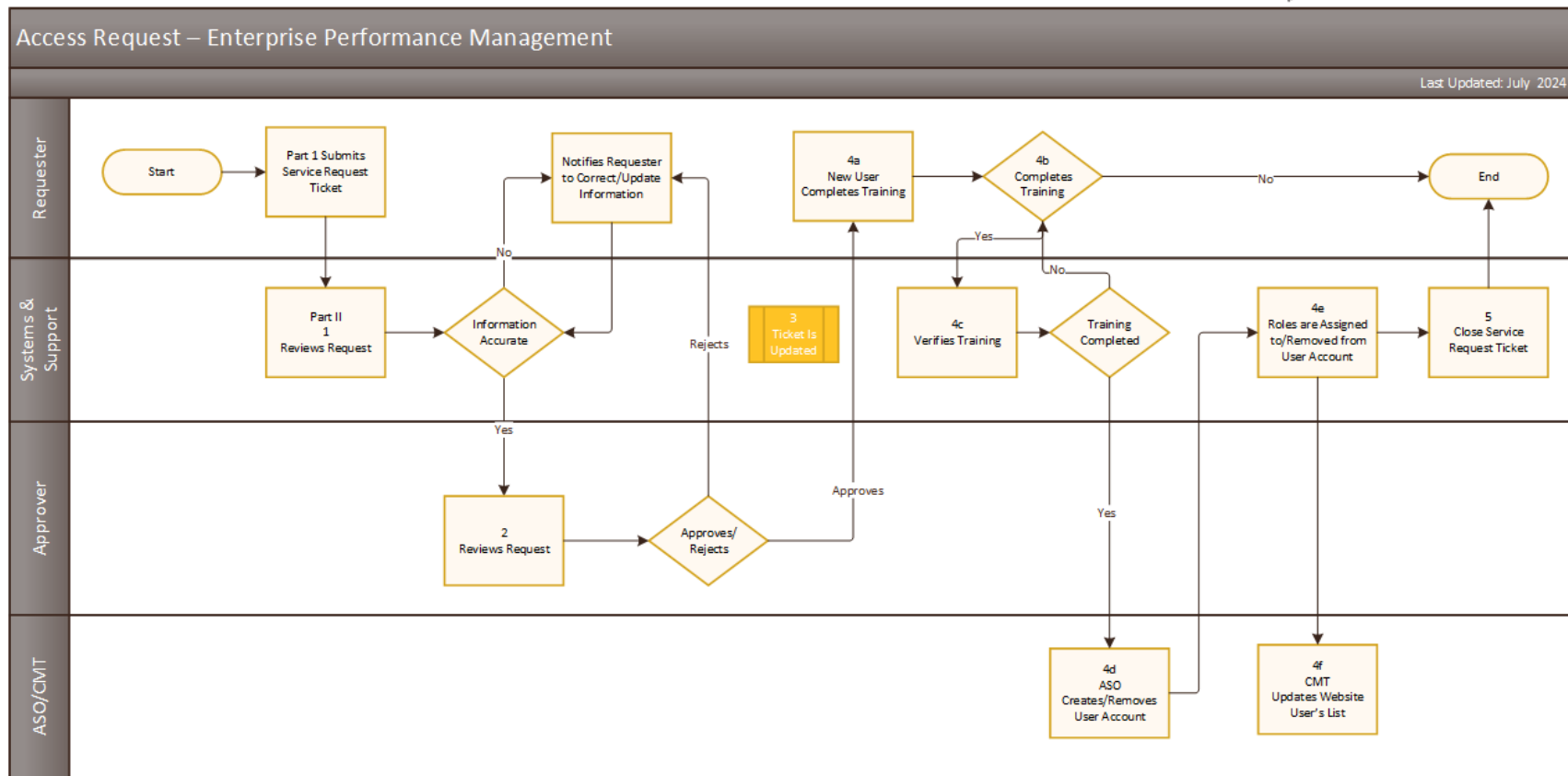
Access Request for Enterprise Performance Management

- a. New Access
 - b. Change Access
 - c. Remove Access
 - d. Other
8. Requested Effective Start Date*
9. Select the Submit button to complete request

Part II: Review/Approval/Change Process

1. Request is received by the WyoCloud Systems & Support Team
 - a. The request is reviewed to ensure information is correct
 - b. The request is then routed for approval
2. Request is reviewed and approved/rejected by the Budget Office and Senior Director of Systems & Business Optimizations
3. The service request ticket is updated to notify the requestor of the outcome
4. If approved
 - a. The new EPM user will need to complete the Enterprise Performance Management training by self-enrolling in WyoCloud Learning
 - b. The new EPM user will need to update the service request ticket indicating the training is complete and include the date the training was completed by replying to the service ticket email.
 - c. The WyoCloud support tech will verify the completion of the training and assign the service ticket to the Application Security Office
 - d. The Application Security Office will create/remove the user account and assign the service ticket to the WyoCloud Financial BAs
 - e. The WyoCloud support tech will assign the user the appropriate role
 - f. The User's List spreadsheet is updated and posted to the website
5. The service request ticket is closed

Diagram:



Notes:

Approver: Budget Office Representative and Senior Director of Systems & Business Optimization

ASO/CMT: Application Security Office/WyoCloud Content Manager & Training Analyst