Hyperion Preferences and Options Setting
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OVERVIEW

When first logging into the Hyperion Workspace and Smart View, there are a number of settings in preferences and options that either need to be set, or will be helpful to set.

These will ensure that your use of Hyperion is more user friendly and help with the workflow component

QUICK STEP BY STEP GUIDE TABLE

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<th>Hyperion Workspace – E-mail Preferences</th>
<th>Smart View - Options</th>
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</thead>
<tbody>
<tr>
<td><strong>1. Log in to Hyperion Workspace</strong></td>
<td><strong>1. Log in to Hyperion Smart View</strong></td>
</tr>
<tr>
<td>(Explorer icon in Citrix)</td>
<td>(Excel icon in Citrix)</td>
</tr>
<tr>
<td><strong>2. Open File / Preferences</strong></td>
<td><strong>2. Navigate to Options</strong></td>
</tr>
<tr>
<td><strong>3. Set the Email Preference</strong></td>
<td><strong>3. Set Data and Formatting Options</strong></td>
</tr>
<tr>
<td>(Planning / Application Settings – provide e-mail address and change task list notification and approvals notification to “Yes”)</td>
<td>(Display columns, blank for missing data, thousands separator, column width)</td>
</tr>
<tr>
<td></td>
<td><strong>4. Set Options as Default</strong></td>
</tr>
</tbody>
</table>
PREFERENCES AND OPTIONS

SETTING E-MAIL NOTIFICATION
This one-time set-up will be used for simple workflow when submitting budgets and forecasts. Promoting a budget form will send it to the owner of the next highest department roll-up level for review. This preference indicates that an e-mail notification should be sent when the budget is promoted and provides the address.

Step 1 – Log in to Hyperion Workspace
Login to Citrix following the link: https://macapps65.mcmaster.ca/vpn/index.html

Then Open Internet Explorer / Hyperion link

Log in to the Hyperion Workspace:

Enter Mac Id
Enter Password
Click log In

Click on Internet Explorer / Hyperion

Enter Mac Id
Enter Password
Click log On
Hyperion Preferences and Options Setting

**Step 2 – Open Planning Preferences**
Open the Planning application:

Select File / Preferences:

**Step 3 – Set the E-mail Preference**
Enter e-mail address and notification options in the Planning sidebar on the Application Settings tab:

Enter your e-mail address, and set task list notification and approvals notification to “Yes”:

Click Save

Click OK
Hyperion Preferences and Options Setting

SETTING SMART VIEW OPTIONS
These options control the appearance of your Smart View reports to make them easier to read.

Step 1 – Log in to Hyperion Smart View
Login to Citrix following the link: https://macapps65.mcmaster.ca/vpn/index.html

Enter Mac Id
Enter Password
Click log In

Select Smart View

Click on Smart View

Excel sheet opens. Click on the Smart View Tab

Click on the Smart View tab

Step 2 – Navigate to Options
Click on Options:

Click on Options
Step 3 – Update recommended settings

1. Data Options

Click on Data Options in the sidebar

Uncheck all suppress columns boxes. This ensures that the same columns always appear on reports even with no data, for ease of reading.

Change #Missing to a blank or -. This ensures that when there is no data for a cell combination it will return a blank cell.

2. Formatting

Click on Formatting in the sidebar

Check Use Thousands Separator.

Check Adjust Column Width. This ensures columns will adjust to the data in the column so all column titles display correctly.
Step 4 – Confirm selected options
Select OK (Set as Default Options):

These options have now been set as the default. To change any options you wish throughout your ongoing Smart View usage always use “Set as Default Options”.

CONTACT INFORMATION

If you require any further assistance in drilldown reporting and identifying variances, please contact the Super Users in your Faculty, Budgeting Services or the Hyperion team.

<table>
<thead>
<tr>
<th>Business</th>
<th>Susan Mitchell</th>
<th>mitchel</th>
<th>27295</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Angie Green</td>
<td>greena</td>
<td>28755</td>
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<tr>
<td>Engineering</td>
<td>Nancy Balfoort</td>
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<td>Joshua McRae</td>
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<td>Kathy Pfeiffer</td>
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<td>Humanities</td>
<td>David Kingma</td>
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<td>Kathleen Blackwood</td>
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<td>Rose Mason</td>
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<td>Usama Seraj</td>
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<td>Francois Joubert</td>
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<td>Chris Sylvester</td>
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<td>Lydia Duarte</td>
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<td>Lou Mitton</td>
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<tr>
<td></td>
<td>Paola Morrone</td>
<td>morronep</td>
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