

# Hyperion Preferences and Options Setting

---

## Table of Contents

OVERVIEW .....	2
QUICK STEP BY STEP GUIDE TABLE .....	2
PREFERENCES AND OPTIONS .....	3
SETTING E-MAIL NOTIFICATION .....	3
Step 1 – Log in to Hyperion Workspace .....	3
Step 2 – Open Planning Preferences.....	4
Step 3 – Set the E-mail Preference .....	4
SETTING SMART VIEW OPTIONS .....	5
Step 1 – Log in to Hyperion Smart View .....	5
Step 2 – Navigate to Options .....	5
Step 3 – Update recommended settings .....	6
1. Data Options .....	6
2. Formatting.....	6
Step 4 – Confirm selected options .....	7
CONTACT INFORMATION .....	7

## 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

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

## 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>



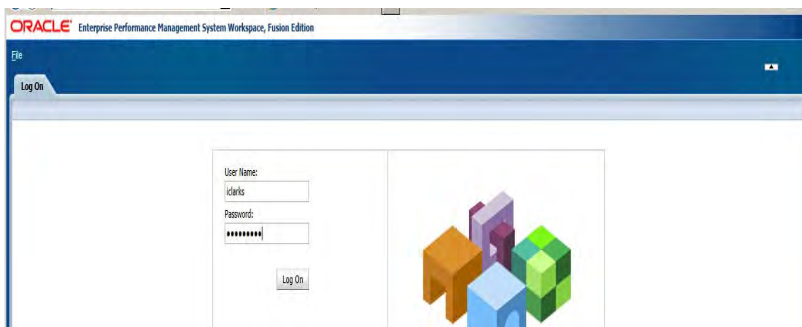
Enter Mac Id  
Enter Password  
Click log In

Then Open Internet Explorer / Hyperion link



Click on Internet Explorer / Hyperion

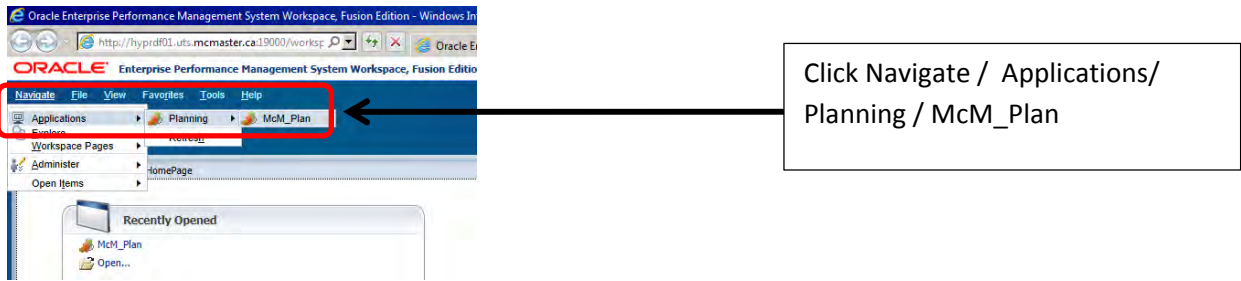
Log in to the Hyperion Workspace:



Enter Mac Id  
Enter Password  
Click log On

### Step 2 - Open Planning Preferences

Open the Planning application:

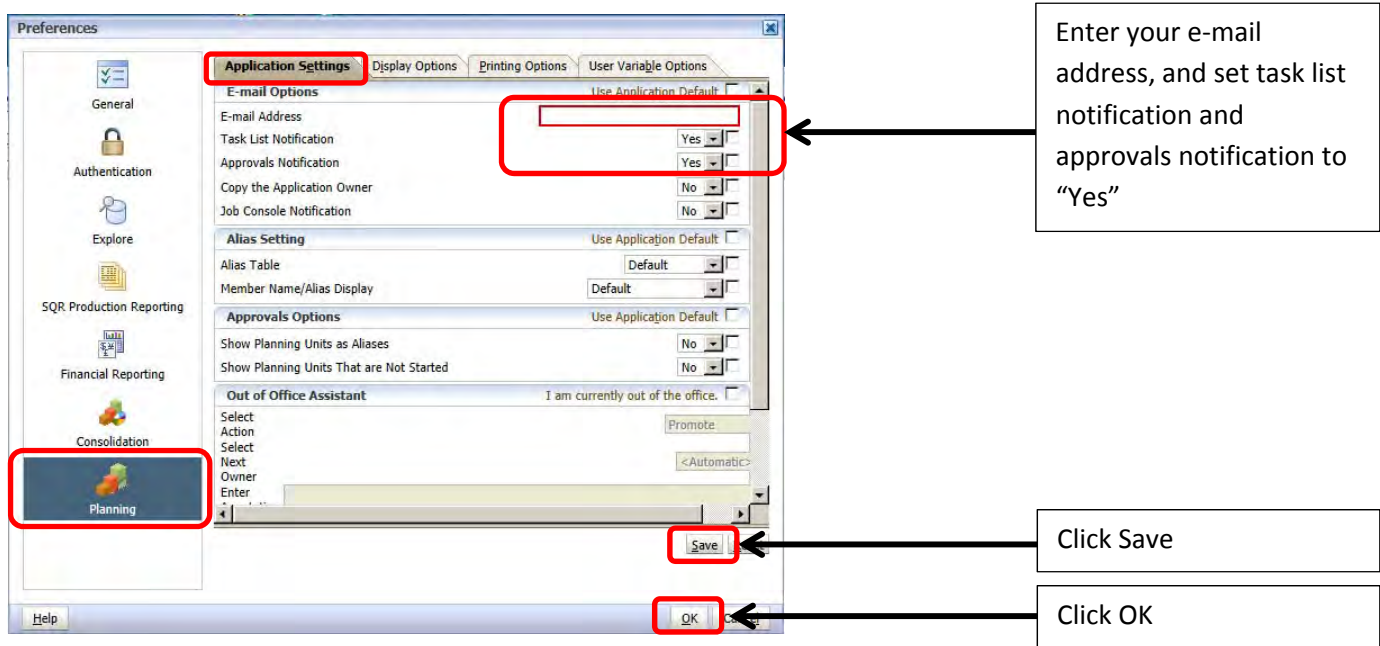


Select File / Preferences:



### Step 3 - Set the E-mail Preference

Enter e-mail address and notification options in the Planning sidebar on the Application Settings tab:



## 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>



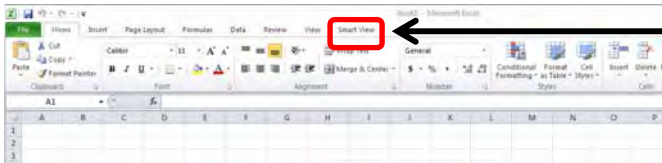
Enter Mac Id  
Enter Password  
Click log In

Select Smart View



Click on Smart View

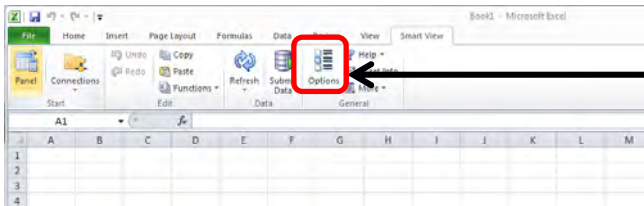
Excel sheet opens. Click on the Smart View Tab



Click on the Smart View tab

### Step 2 – Navigate to Options

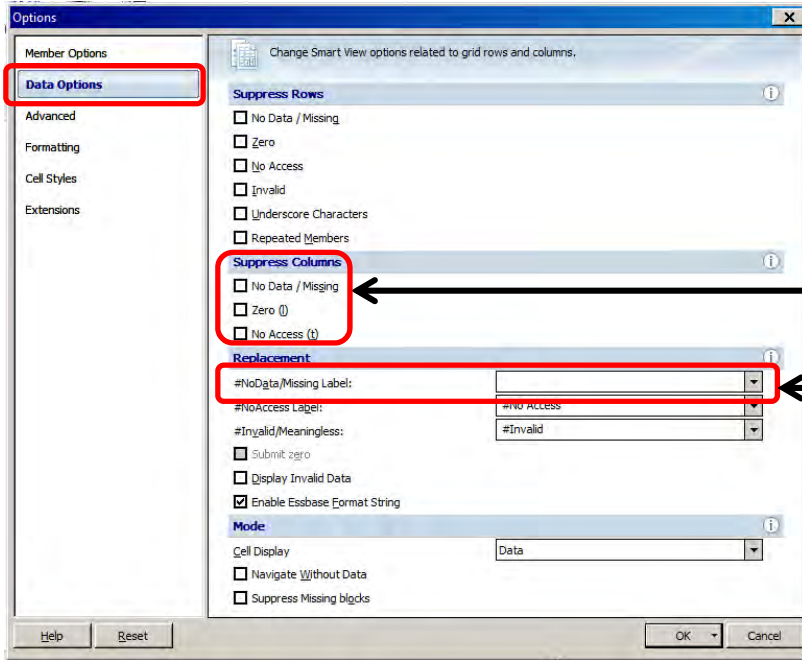
Click on Options:



Click on Options

### Step 3 - Update recommended settings

#### 1. Data Options

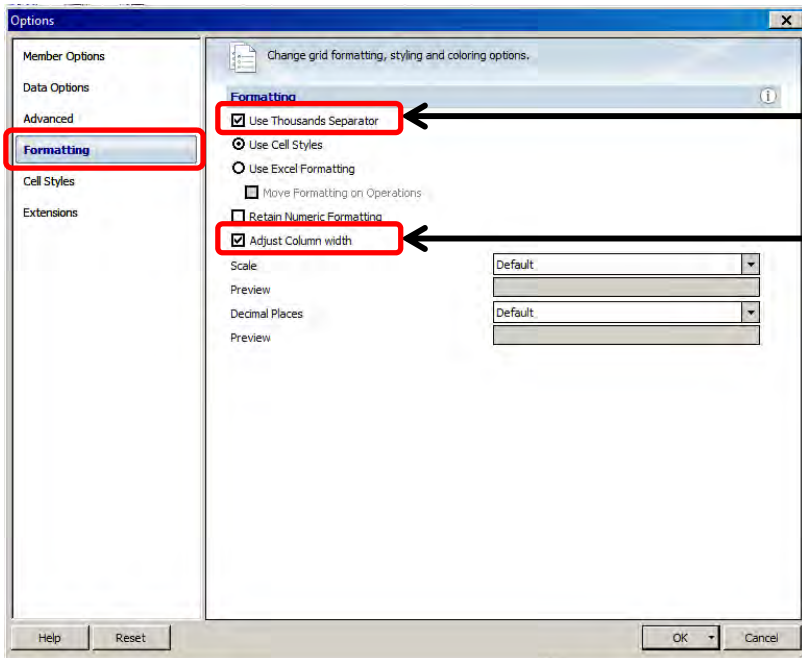


Click on **Data Options** in the sidebar

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



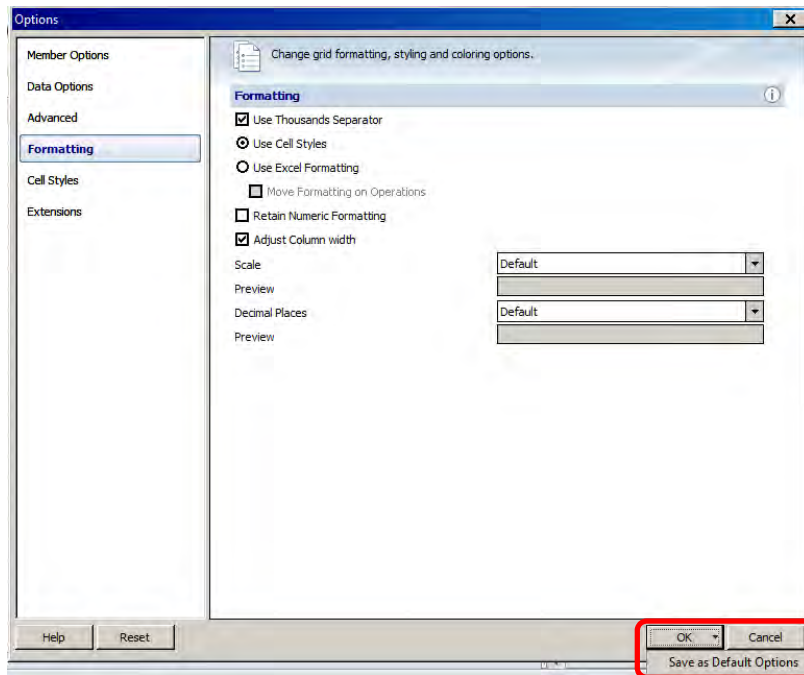
Click on **Formatting** in the sidebar

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):



Click on the **black triangle** next to OK. Then select “Save 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.

<b>Business</b>	Susan Mitchell	mitchel	27295
	Angie Green	greena	28755
<b>Engineering</b>	Nancy Balfoort	balfoort	24289
	Joshua McRae	mcraej	24159
<b>Health Sciences</b>	Kathy Pfeiffer	pfeiffe	22191
	George Hamilton	hamgeo	22420
<b>Humanities</b>	David Kingma	dkingma	24602
	Phoebe Hu	huphoeb	24680
<b>Science</b>	Kathleen Blackwood	blackwo	23346
<b>Social Sciences</b>	Rose Mason	masonr	24728
	Usama Seraj	seraju	22884
<b>Budgeting Services &amp; Hyperion team</b>	Francois Joubert	joubert	24316
	Chris Sylvester	sylvest	24766
	Lydia Duarte	duartel	23934
	Iain Clarkson	iclarks	21960
	Lou Mitton	mittonl	
	Paola Morrone	morronep	21640