

Hyperion Quick Guide

Workflow and approval process

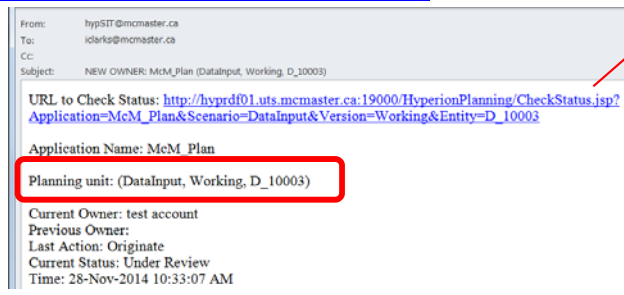
Budgeting Services & Hyperion team	Francois Joubert	joubert	24316
	Chris Sylvester	sylvest	24766
	Lydia Duarte	duartel	23934
	Iain Clarkson	iclarks	21960
	Lou Mitton	mittonl	20821
	Paola Morrone	morronep	21640

IMPORTANT: To confirm if you are an initial department owner with department write access for entering budgets please view the promotional path for workflow in the **Hyperion Current Workflow document issued with this guide or on the Budgeting website.**

To ensure you receive the **email notification** component of Hyperion Workflow, ensure you have set up your email as per the Hyperion Preferences and Options Setting guide on the Budgeting Services website http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm

1. Forms released and workflow started

- On release of the forms workflow will be initiated
- If you have initial write access to a form for a department and have set up your email as per the Hyperion Options and Preference guide you will receive an email from Hyperion
- An email for each department to which you have access indicating which Scenario (**DataInput** for 8 Month Review, Budget and Plan years), Version (**Working**), and Department (**D_XXXXX**)



Note on Email URL

- The Hyperlink URL is not compatible with Citrix access, so **do not use**. Instead follow step 2 logging into your form via citrix Hyperion Smartview.

What if Email notification is not set up

Even if you do not have email set up in preferences, once the forms are released you will have write access and be able to enter budgets and carry out the next steps. **But**, setting up the email will help yourself and others to receive notifications.

2. Connect to Hyperion Smartview and Open a Form

- See the Hyperion Quick Guide – Log in and access forms and reports (available on Budgeting Services website http://www.mcmaster.ca/bms/BMS_FS_Budgeting.htm)

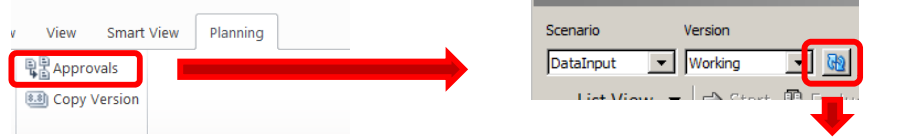
3. Enter the Budget for the department

- Use the Guides for Labour and Opex planning to navigate forms and enter the department budget
- Note:** If you are not the only person with access to the department and entering budgets, ensure budget is completely entered or ready for promotion before moving on to the next step

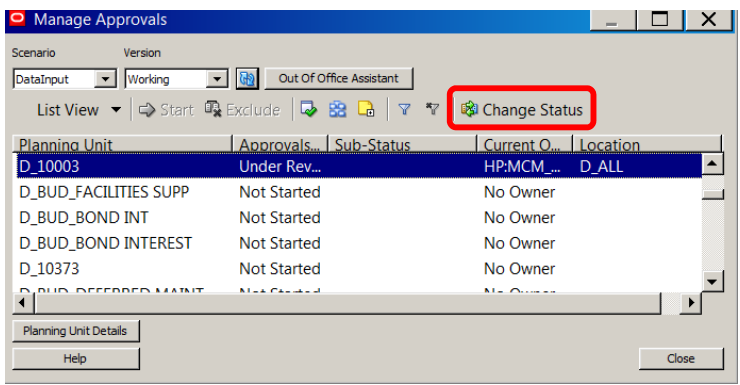
4. View Approval Status for Departments

- Within Hyperion SmartView with a Form open
- Planning tab
- Approvals

- Ensure Scenario is **DataInput** and Version is **Working**, use dropdowns if necessary, then Click **Refresh**

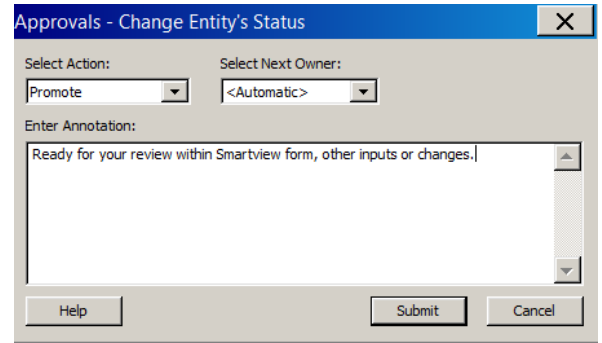


- List of all your departments (Planning Units) and current status in the Hyperion Approval process
- Select the department you wish to action
- **Note:** Planners with access to a whole upper level roll up, can select that instead of individual departments
- Select Change Status



5. Promote (or Reject) Departments

- Select Action :
- Promote** - All current owners to promote to next workflow level owner
- Reject** - if you are a Level 2 or Level 3 workflow owner sending back to previous owner for changes
- Take Ownership** - for level 2 or 3 workflow owner to take write access to selected department
- Select Next Owner: **<Automatic>**
- Enter Annotation if you have any comment for the next owner
- **Click Submit** – The new owner will receive an email (if their email is set up in Preferences)
- Note for initial level owners:** Once Submitted you can now no longer edit the budget forms for this department, you must get the current owner to Reject it back to you to be able to make further changes.



Important notes:

- The workflow process will be in place to control who can make changes on forms.
- Promotion and Rejection of approvals in Manage Approvals is best accompanied by verbal or written confirmation to the new owner, or one of the new owners if part of a group
- It does not replace the existing formal Budget review and submission process either within departments, budget envelopes, or for Budget Committee
- If you require a change in the workflow set up, security access, or assistance with workflow contact Budgeting