
Setting User Preferences

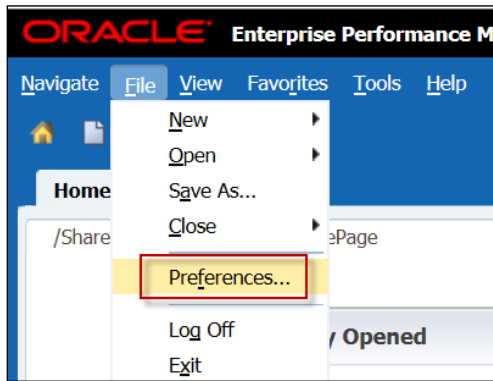
In the UF Hyperion Budgeting application, setting user preferences allows you to define the default content to display when you login to Hyperion. You can also use these settings to define the number formatting, page options and other options. In this guide you will update the recommended user settings.

To have access to the Hyperion Budgeting application, you must have the security role **UF_N_BP_COLLEGE_PLANNER**. If you do not have access and need it, please contact your Departmental Security Administrator (DSA).

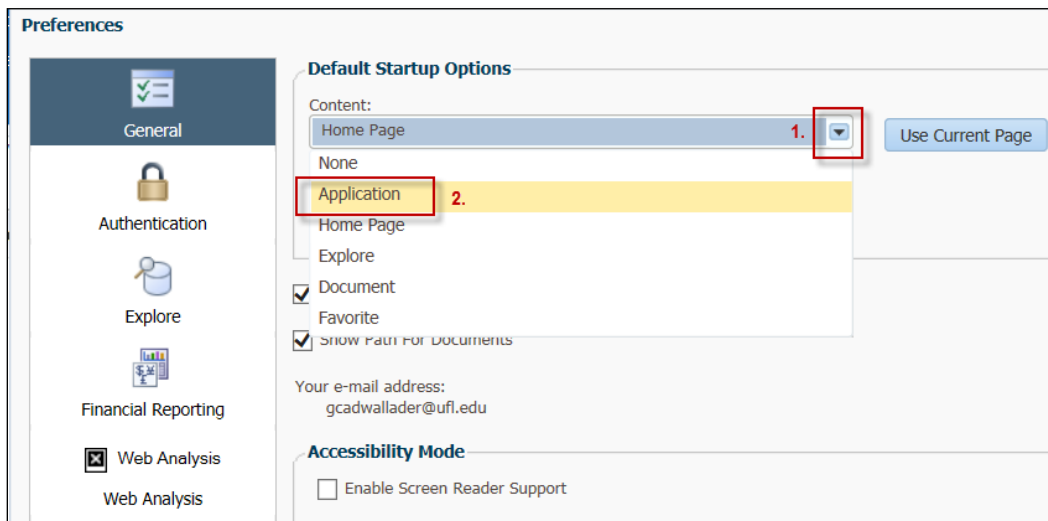
1. Login to myUFL (my.ufl.edu) using your GatorLink username and password.
2. From your myUFL menu, select **Main Menu > Budgeting > UF Hyperion Budgeting**

Updating Preference/Selecting the Planning Application

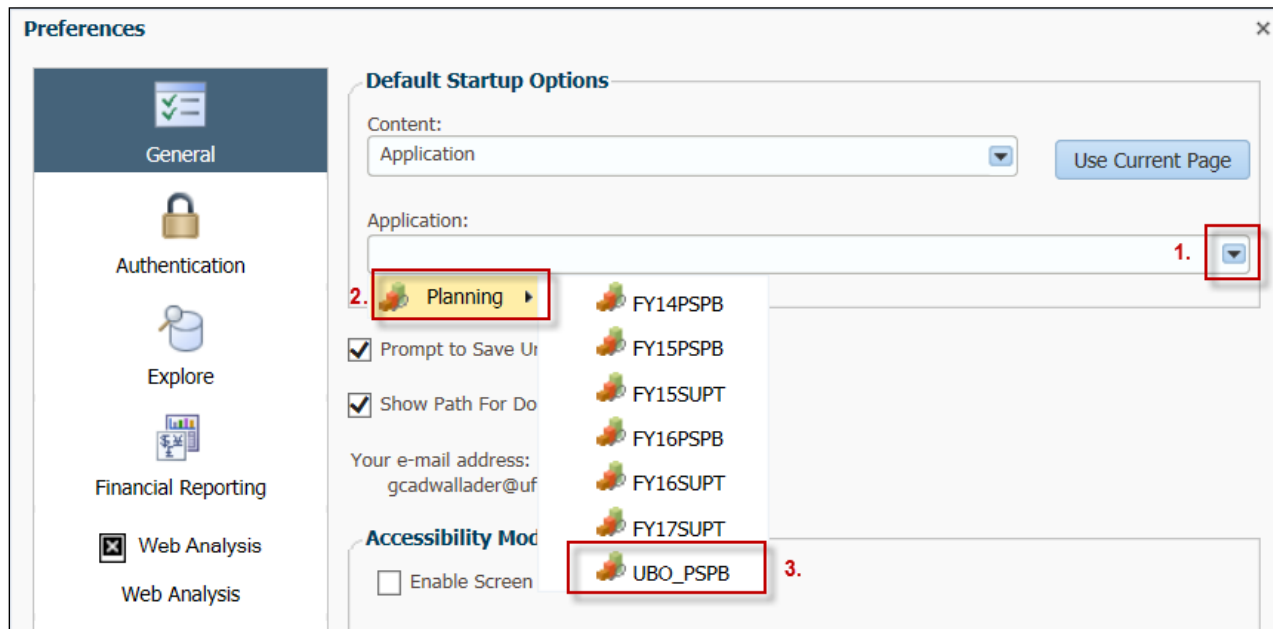
3. Click the **File** from the Hyperion menu.
4. Click the **Preferences** menu item.



5. Click the **Home Page** drop down menu.
6. Select **Application** from the drop down list.



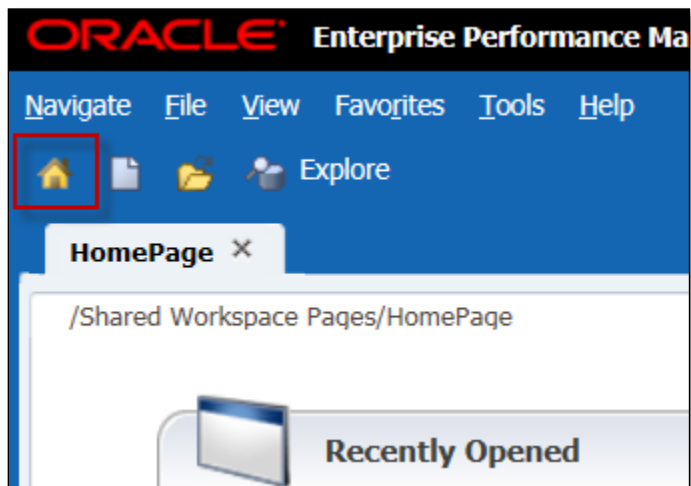
7. Select the **Application** drop down menu.
8. Select the Planning Application: **UBO_PSPB**.



9. Click the **OK** button.

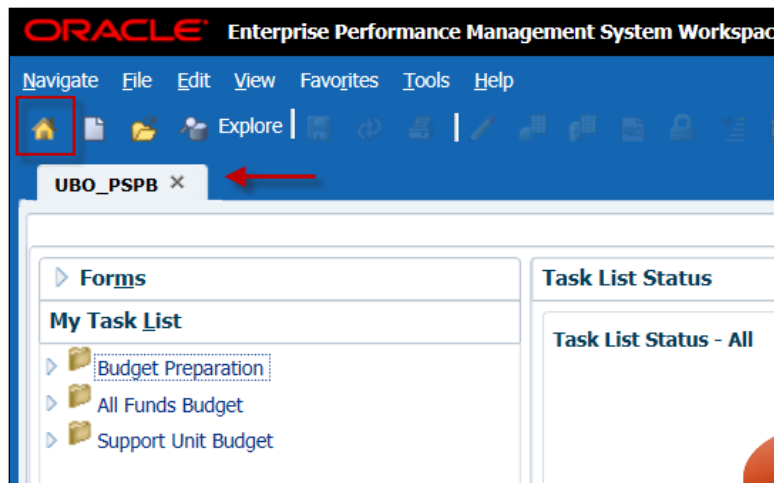
Display Options

Next, you will need to open the link UBO_PSPB to make additional adjustments to your settings. If UBO_PSPB does not appear in left column, click the home button or go to Navigate >> Applications >> Planning >> UBO_PSPB.



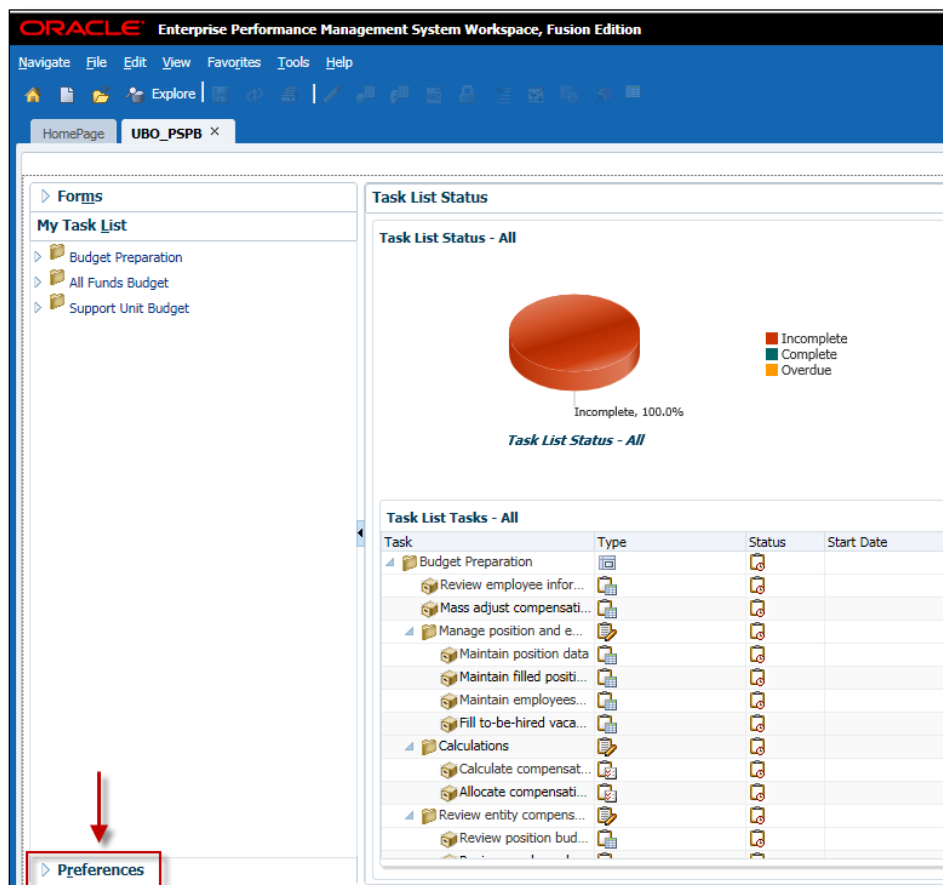
10. If this is your first time in the application, you will see the HomePage tab and you can select UBO_PSPB in Recently Opened.

Once you have changed your default start-up settings listed above, you will no longer see the home tab. The page opens to the UBO_PSPB tab.

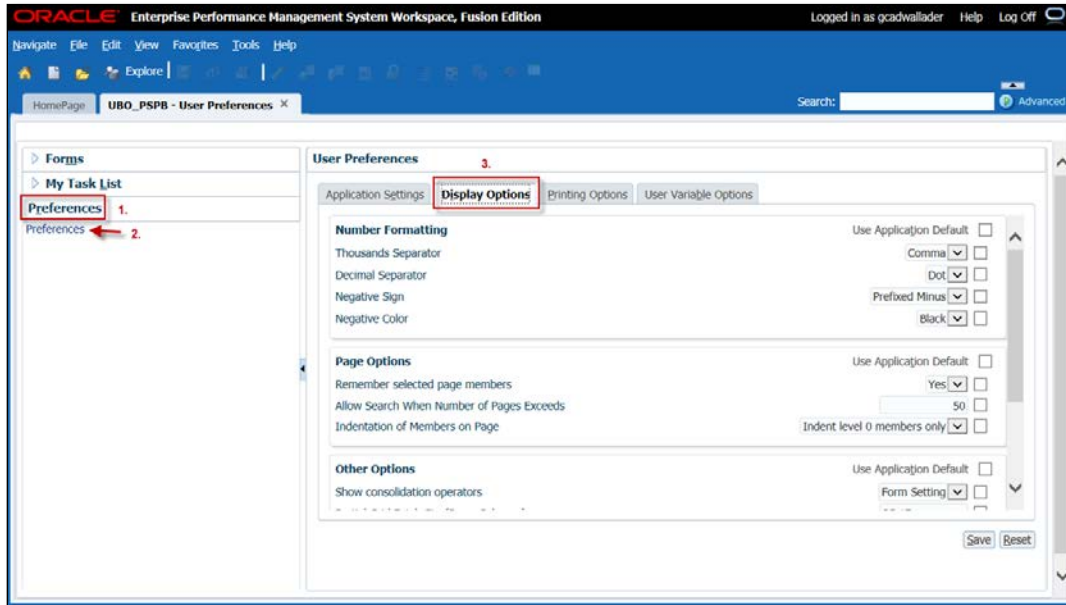


The new version of Hyperion has "Preferences" option on the left panel.

11. Click **Preferences** >>> Preferences



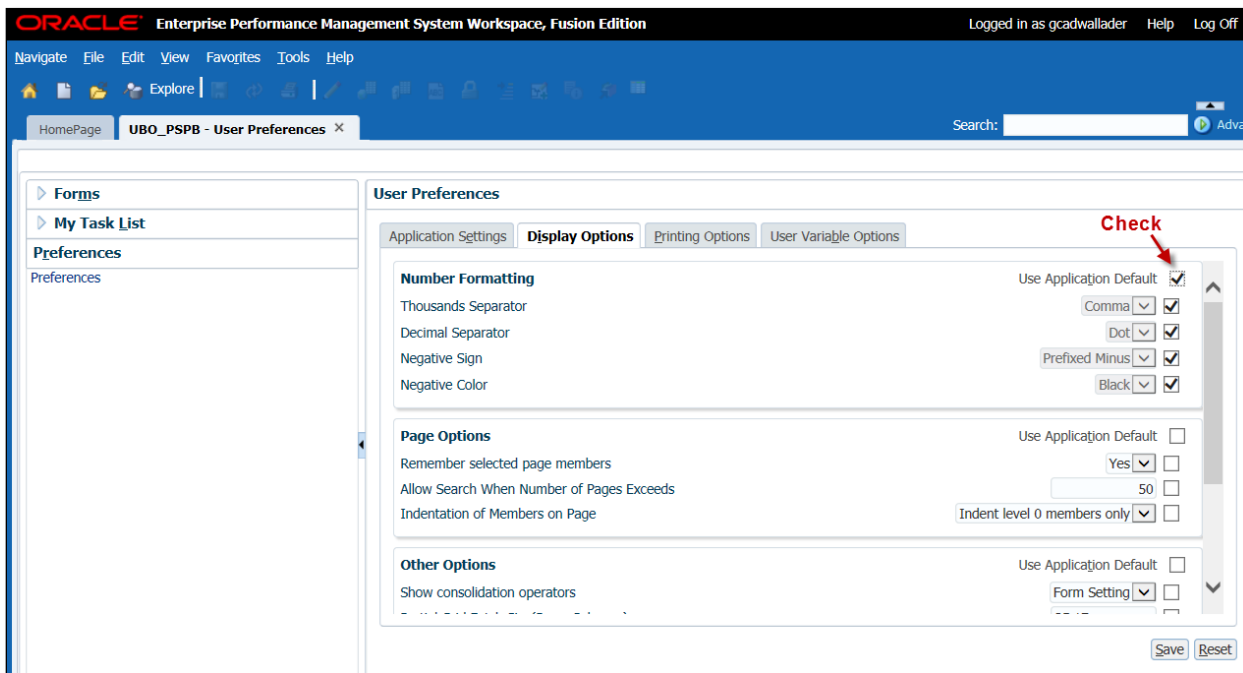
12. Display Options tab.



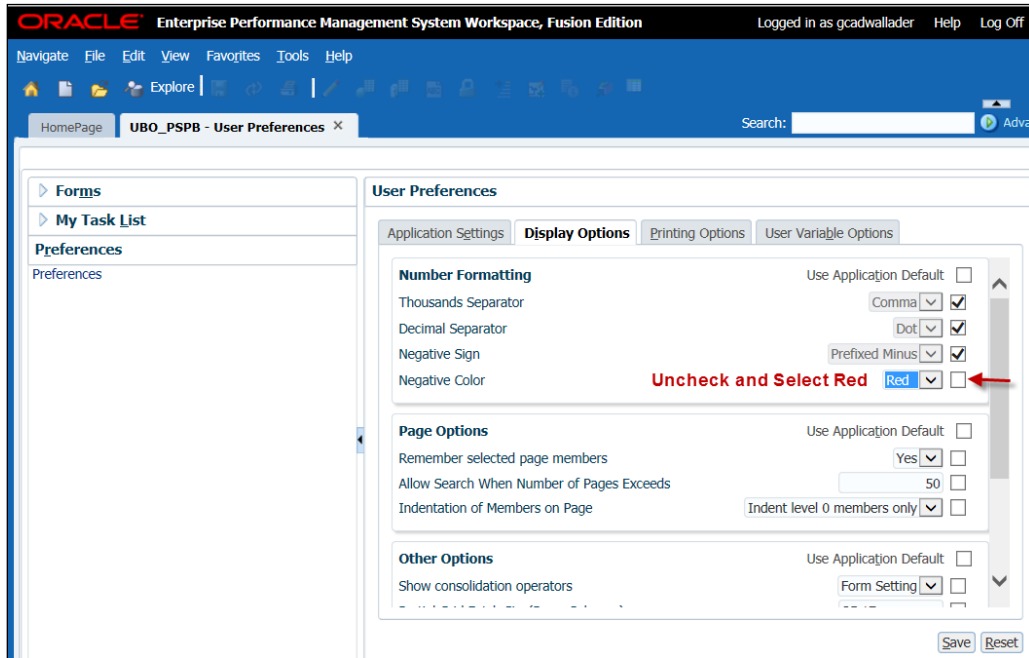
The new version of Hyperion has some default settings. For example:

- The Thousands Separator is default to comma.
- The Negative Color is default to Black.

If you want to use your own setting, such as changing the Negative Color to Red. Check the Use Application Default.

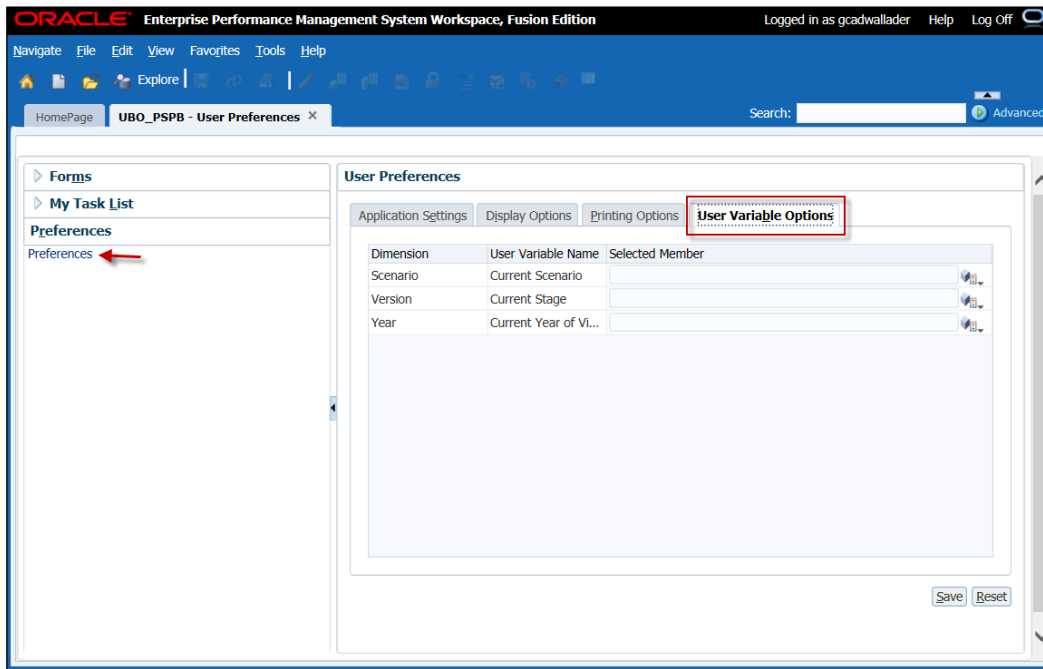


13. Uncheck the checkbox for the **Negative Color**. Select **Red**. And **SAVE**.

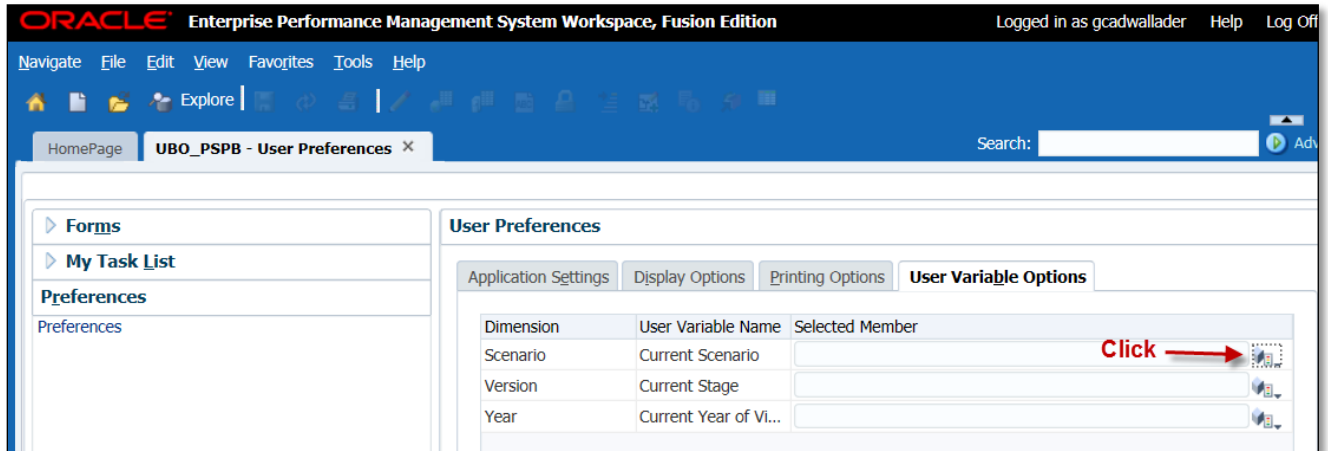


User Variables

User variables filter the members displayed on data forms, letting you focus on those members you are interested in, such as your own department's expenses. Go to User Variable Options tab either from File >> Preferences >> Planning or left panel Preferences >> Preferences.

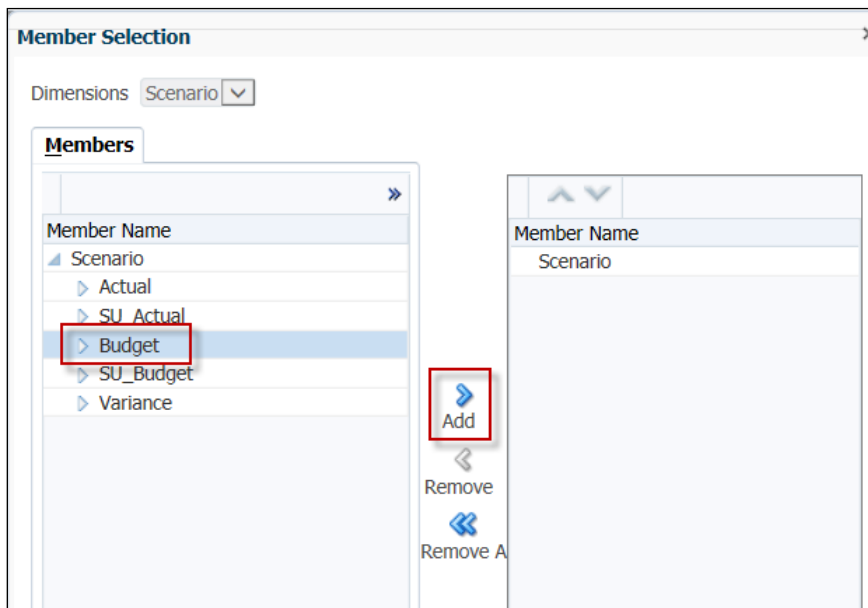


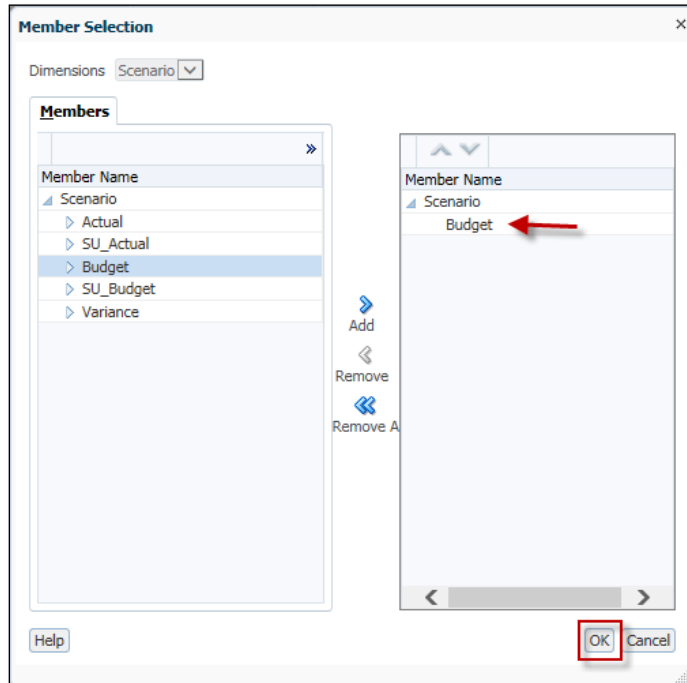
14. Click the **Search** button next to **Scenario: Current Scenario**.



15. Click the **Budget** tree item.

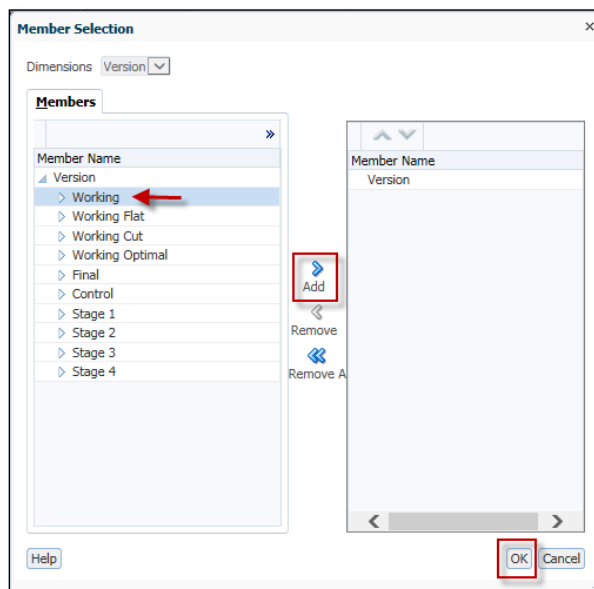
16. Click the **right arrow** to move Budget to the right side.





You will now see your Budget in the Right column.

17. Click the **OK** button.
18. Next, click the **Search** button next to **Version: Current Stage**.
19. Click the **Select Members** button.
20. Select **Working** from the list.
21. Click the **right arrow** to move Working to the right side.

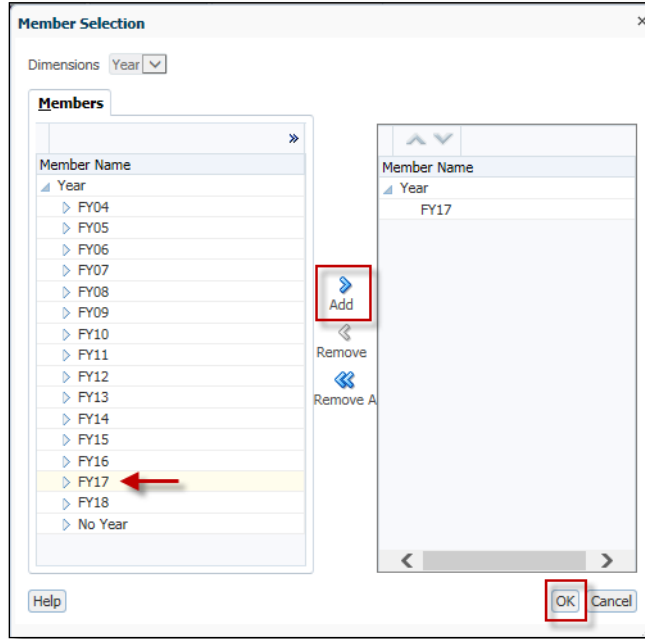


22. Click the **OK** button.

23. Click the **Search** button to the right of **Year: Current Year of View**.

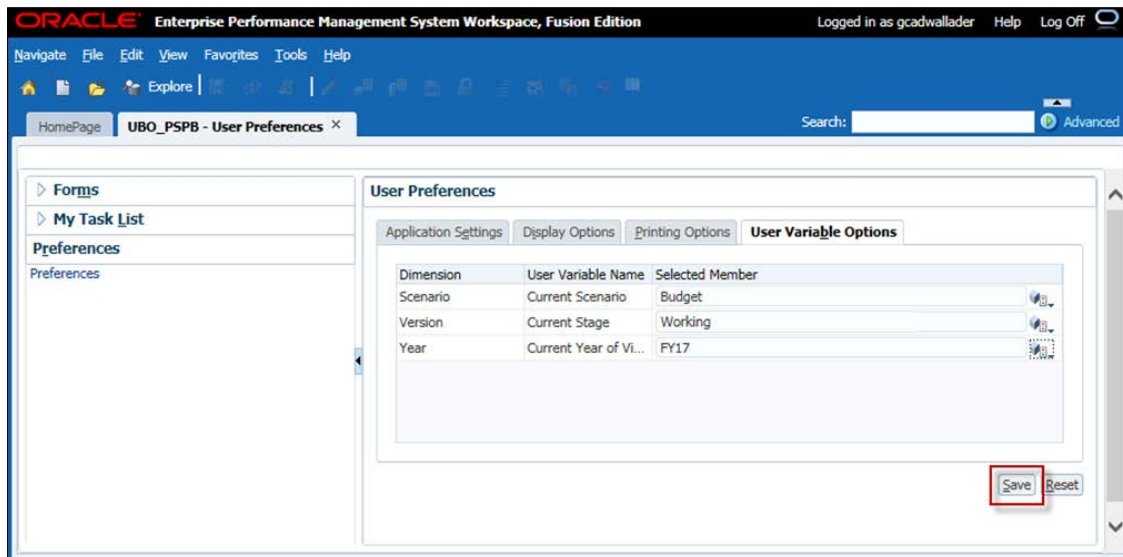
24. Select **FY17** from the list. This will need to be changed each Fiscal Year.

25. Click the **right arrow** to move your selection to the right side of the screen.



26. Click the **OK** button.

27. Click **Save**.



If you are at the Support Unit Budget Request cycle, please make sure to use "SU_Budget" for Scenario and either "Working Flat" or "Working Optimal" for Version.

If you are at the All Funds Budget cycle, please use "Budget" for Scenario and "Working" for Version.

If you need help with...

- Technical issues, contact the UF Help Desk:
 - 392-HELP
 - helpdesk@ufl.edu
- Policies and Directives, contact the UF Budget Office at (352) 392-2402 or <http://cfo.ufl.edu/administrative-units/budget/>