



HYPERION

TMG Salary Administration

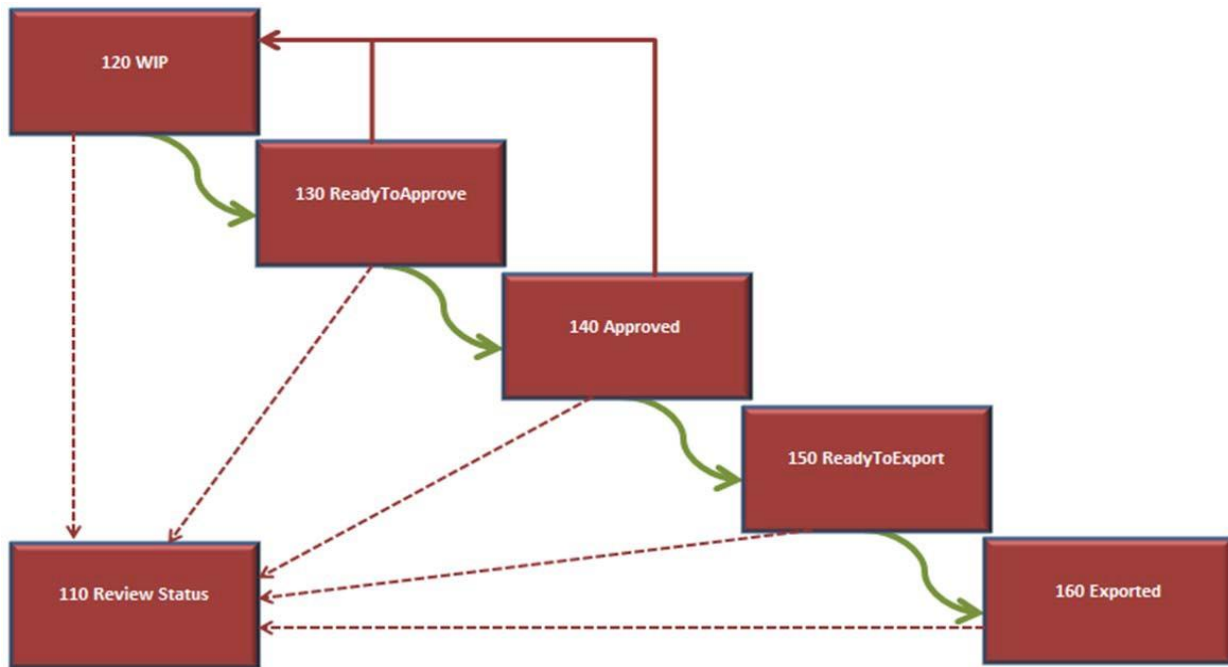
User Guide

(June 2021)

Contents

Hyperion – TMG Forms Process Flow and Definitions	1
How to Download and Install Hyperion Smart View – Salary Administration	2
Smart View – Using TMG Reviewer Forms.....	16
Smart View – Using TMG Approver Forms.....	22
Smart View – Review Status Form.....	25
Tracking the Merit Pool Allocations	27
Smart View - Saving and Printing	28
Disconnecting from Hyperion Smart View and Exiting Excel	29

Hyperion – TMG Forms Process Flow and Definitions



<p>120 WIP</p>	<ul style="list-style-type: none"> ➤ This form is used to enter merit and performance ratings, and to mark TMG data as <i>Ready to Approve</i>. ➤ Any changes to merit or performance ratings always need to be completed in this form. ➤ If a form has been sent on to any subsequent forms below and requires revisions, the user must send the data back to this form to update.
<p>130 Ready to Approve</p>	<ul style="list-style-type: none"> ➤ This form is accessible by TMG Approver and Human Resources, but not TMG Reviewer ➤ From this form, the TMG Approver can either mark the TMG members as Approved (to migrate them to form 140 Approved), or send the TMG member’s data back to form 120 WIP for further revisions.
<p>140 Approved</p>	<ul style="list-style-type: none"> ➤ This Form is only accessible to Human Resources Services but the Approved status will be viewable to both Approvers and Reviewers via form 110 Review Status. ➤ From this form, Human Resources Services can either mark the TMG members as Ready for Export (to migrate them to 150 Ready for Export), or send them back to form 120 WIP for further edits, if issues are encountered.
<p>150 Ready to Export</p>	<ul style="list-style-type: none"> ➤ This Form is only viewable to HR but the Ready to Export status will be viewable to Approvers and Reviewers via form 110 Review Status. ➤ TMG member’s data has been confirmed HR, and is staged for export from Hyperion.
<p>160 Exported</p>	<ul style="list-style-type: none"> ➤ This Form is only viewable to HR but the Exported status will be viewable to Approvers and Reviewers via form 110 Review Status. ➤ TMG member’s data has been exported from Hyperion and is ready to be uploaded back into Mosaic by HR. Migration to this form happens as part of the Export process.
<p>110 Review Status</p>	<ul style="list-style-type: none"> ➤ This form can be viewed by Reviewers, Approvers, and Human Resources Services. ➤ This form provides TMG status information as it pertains to the Salary Administration process within Hyperion, for all employees in the selected department regardless of what Form in the process their record is currently on.
<p>➤ Note: All TMG Forms listed above also include a worksheet called 110 – Merit Available which displays totals related to the Merit Pool dollars, dollars already allocated, dollars remaining for allocation. This worksheet updates on each Submit Data click and is accessed as a Tab found at the bottom of each form.</p>	

[How to Download and Install Hyperion Smart View - Salary Administration](#)

Before Beginning:

-Microsoft Excel must be installed locally on your computer to use Smart View. It is not compatible the O365 Browser version of Excel.

-All Microsoft products is required to be closed including the ones running in the background including the ones in the hidden icons.

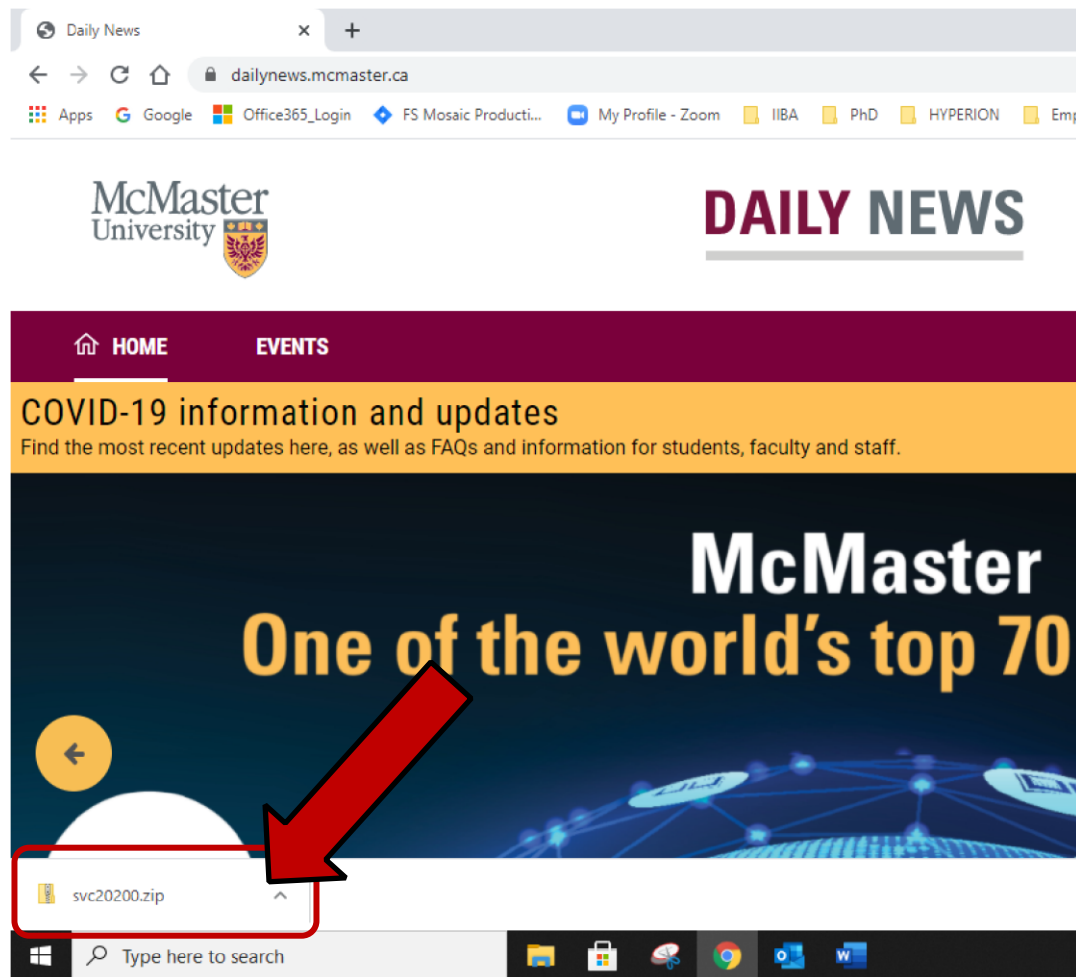
-If you are working remotely from home, a connection to VPN is required. Please reference the instructions on the UTS website regarding how to connect to VPN

(<https://uts.mcmaster.ca/services/computers-printers-and-software/virtual-private-networking/>).

1. Download Smart View from the MacDrive site:

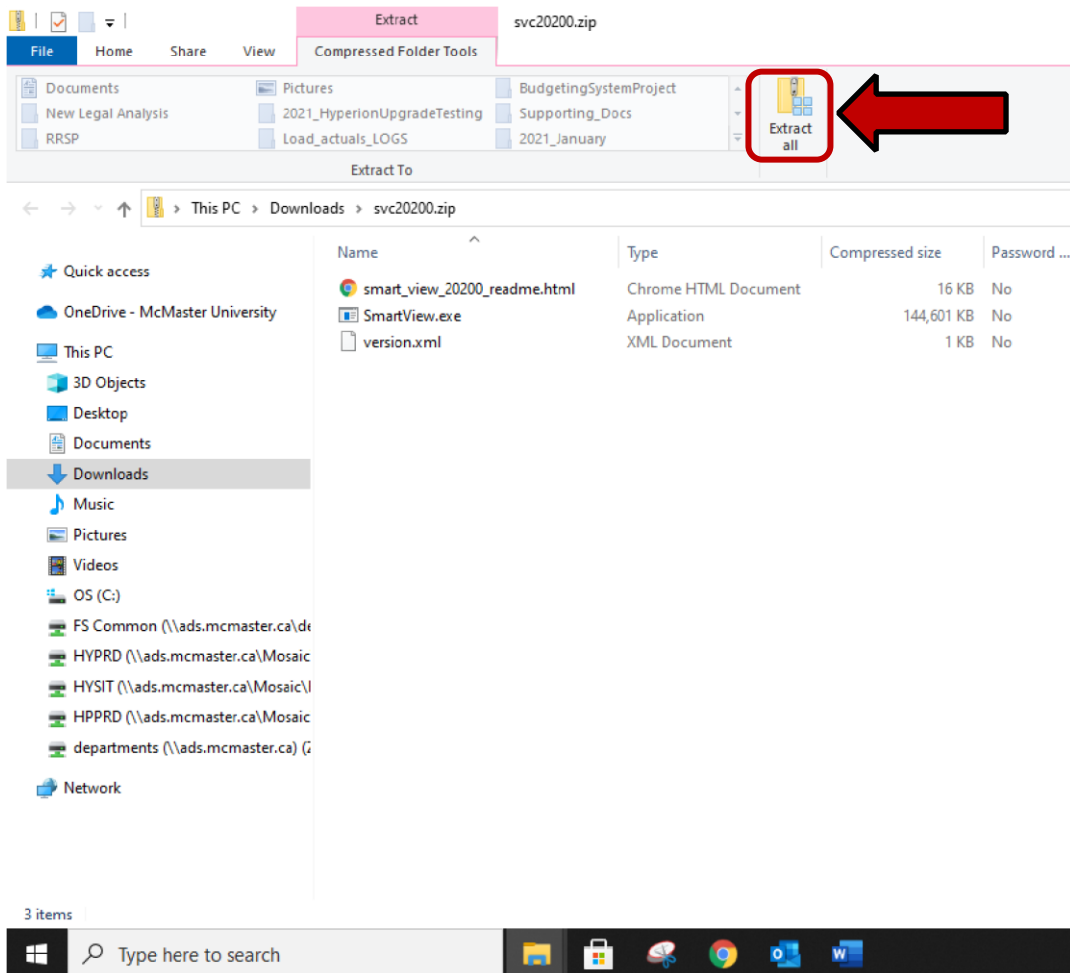
Click [here](#) to download

This will download the file svc20200.zip to your downloads folder.

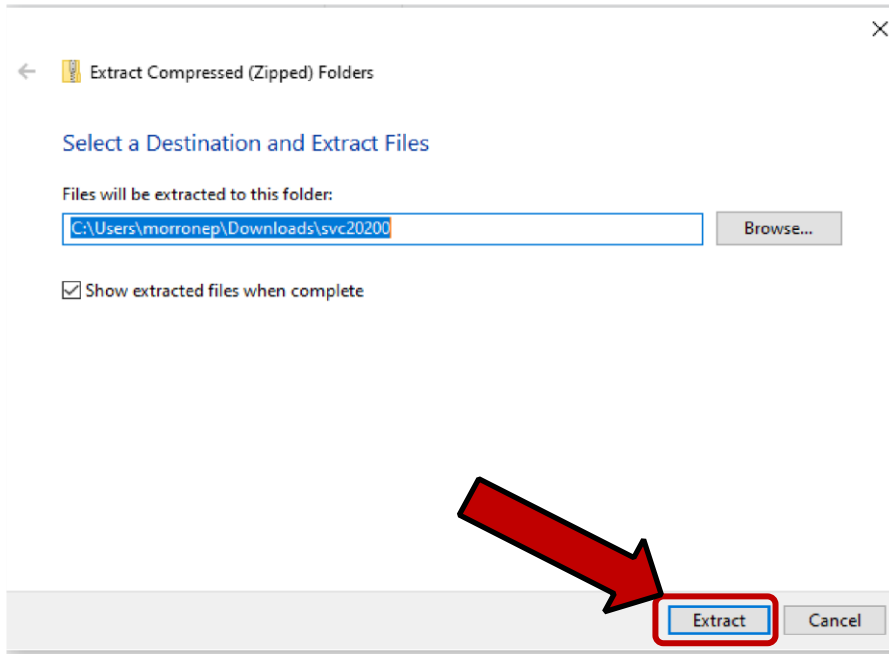


HYPERION TMG Salary Administration

- From your browser click the svc20200.zip Icon, this will open a Windows Explorer pop up.
Click the **Extract ALL** button to Unzip the file to a temporary location.

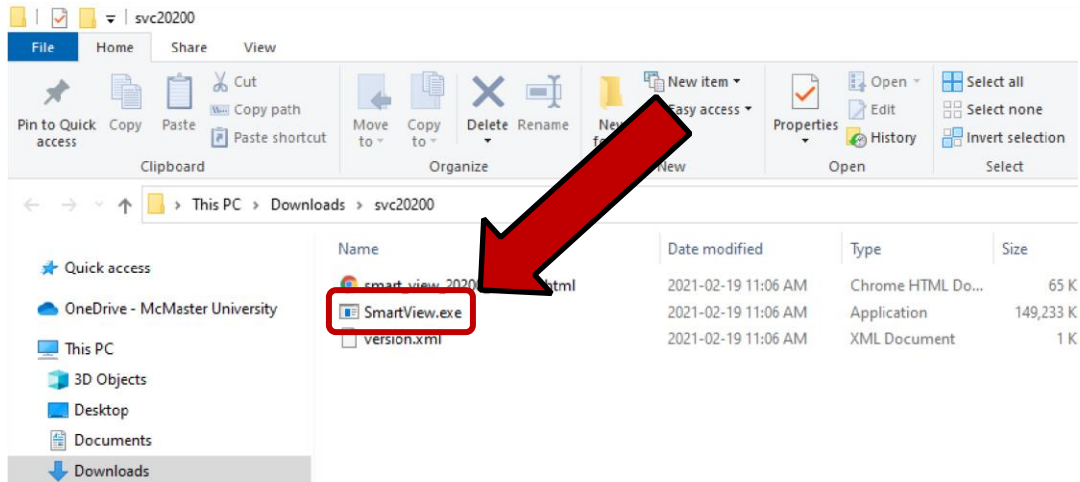


3. In the Pop-Up click the **Extract** button

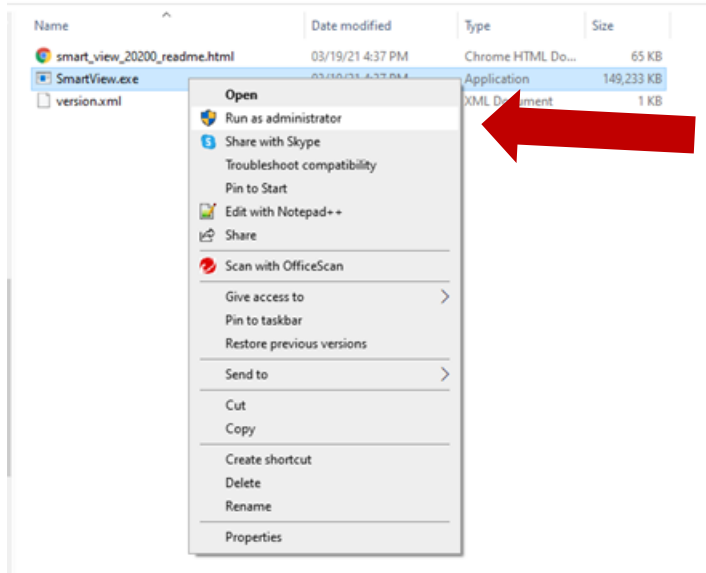


4. The system then shows you all the extracted files in Windows Explorer.

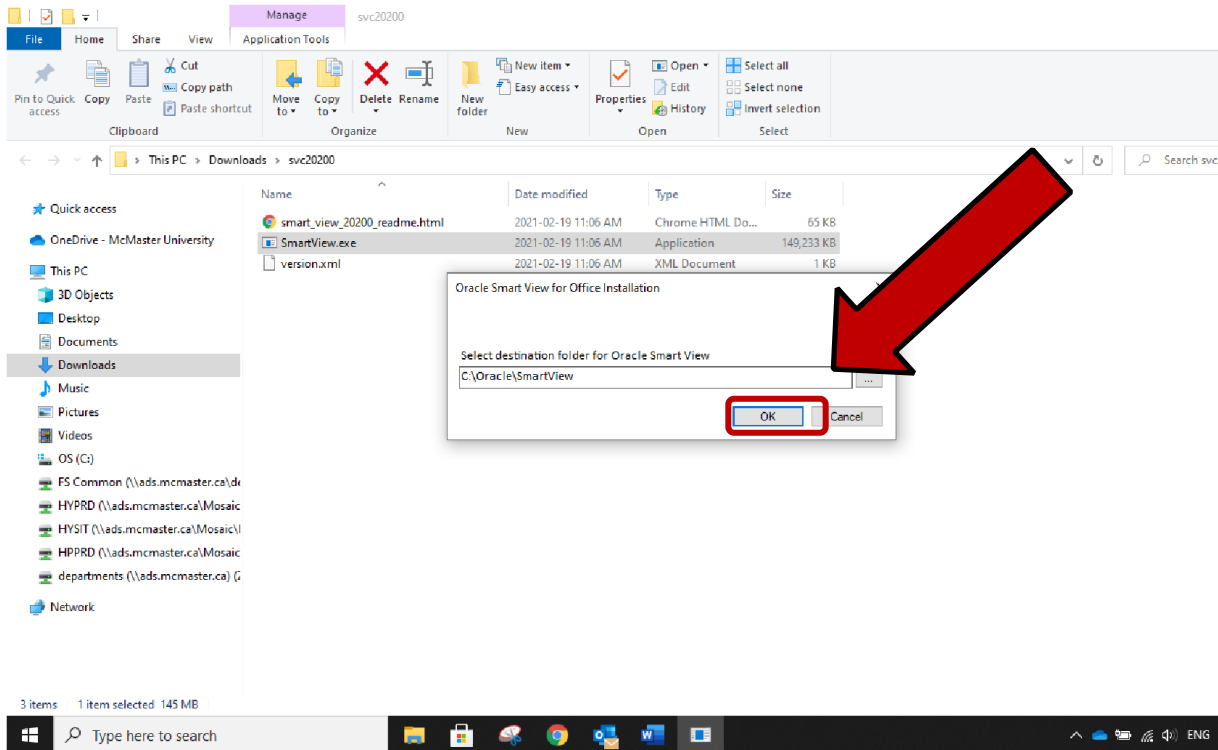
Double click the file called **SmartView.exe** to install the add-in



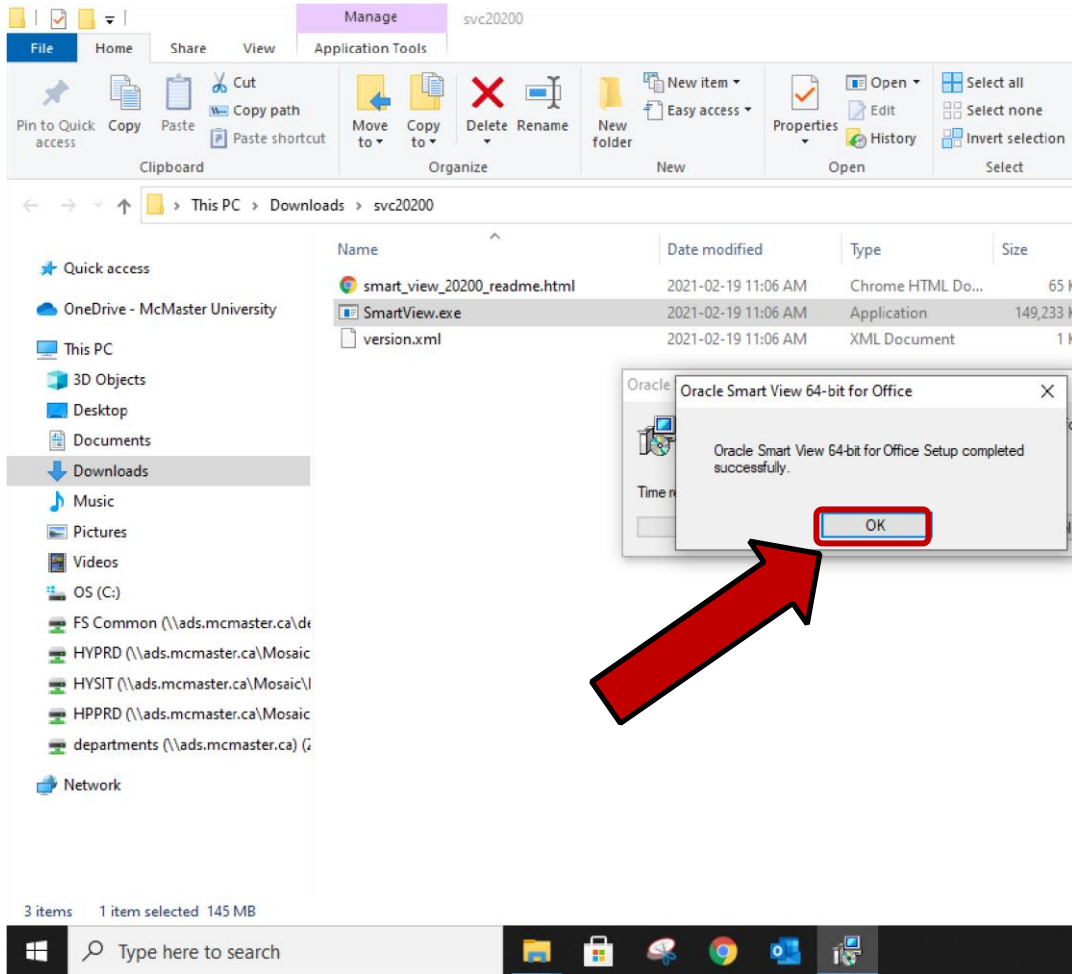
5. To start the installation wizard, right-click on your mouse SmartView.exe and select Run as administrator.



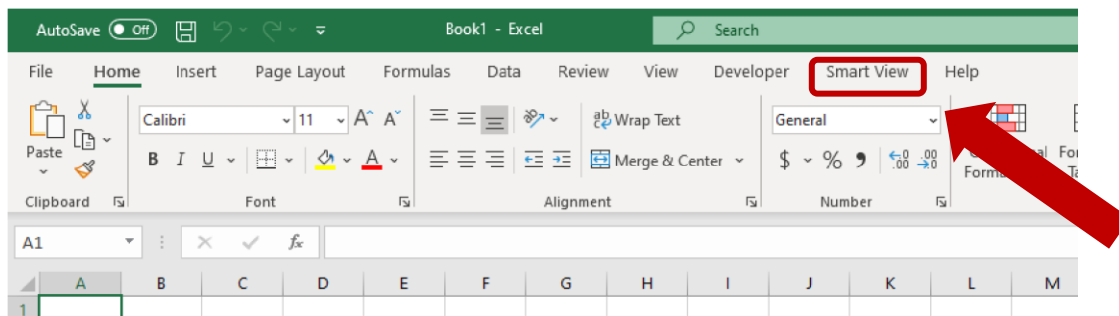
6. Select the destination folder for oracle smart view installation.



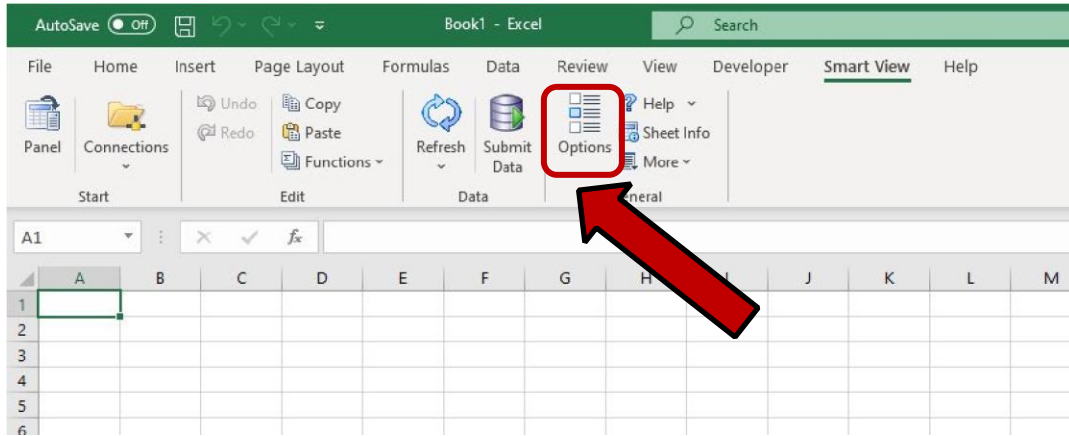
7. When the installation is complete a pop-up will come up. Click OK button



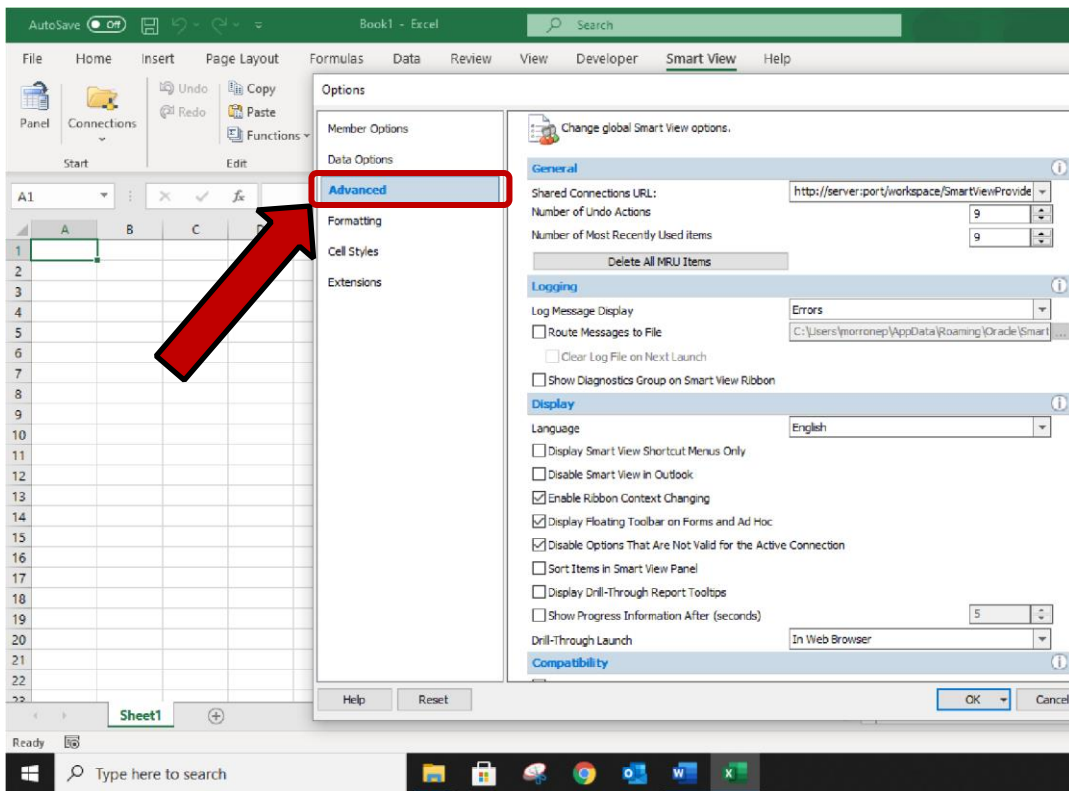
8. Open Microsoft Excel on your computer and validate if the Smart View ribbon is displayed.



9. Click on the SmartView Tab and then click on Options to start setting up the connection to the Hyperion database

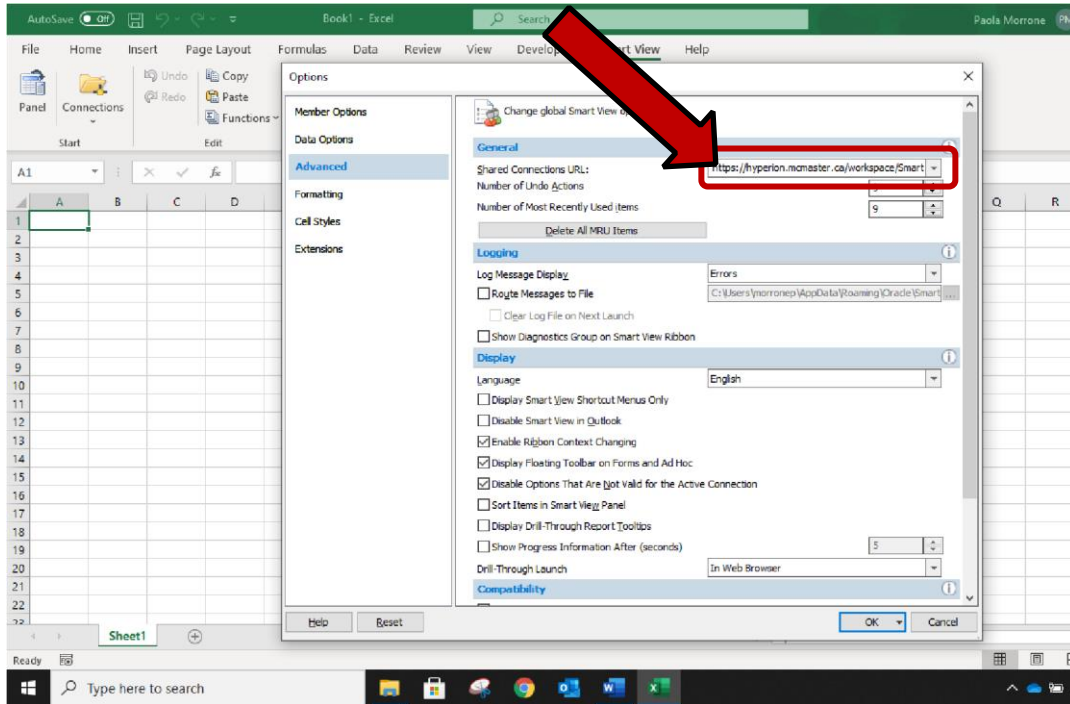


10. The SmartView options Pop-Up opens. Select Advanced

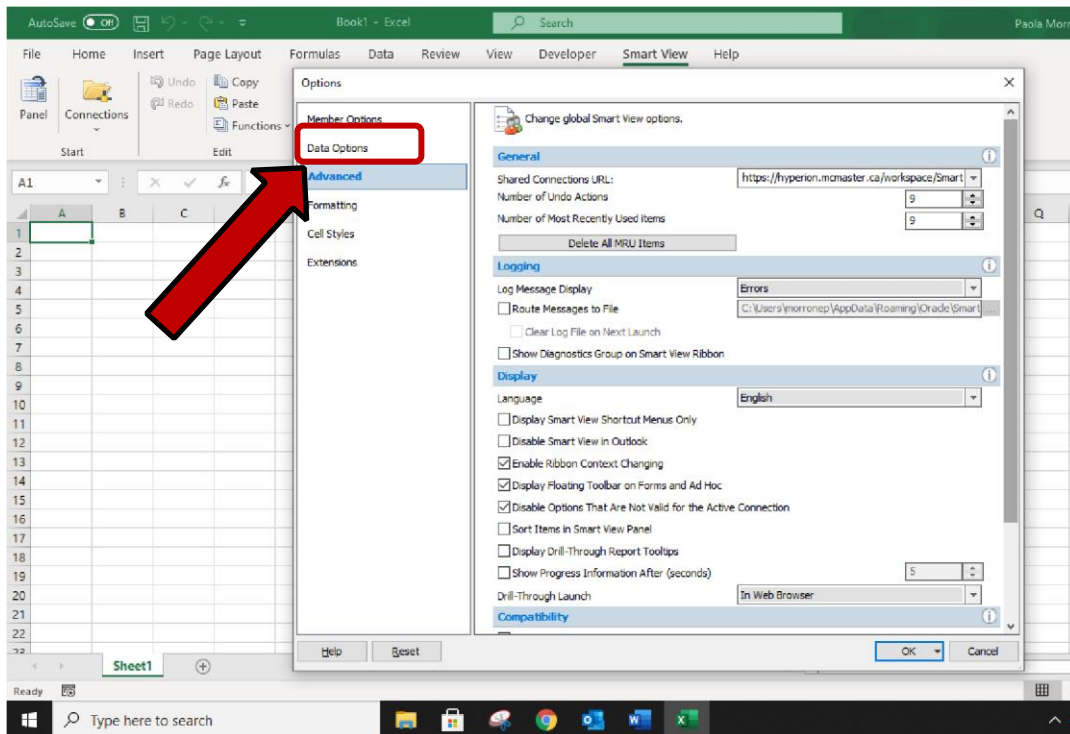


11. In the Shared Connections URL box enter:

<https://hyperion.mcmaster.ca/workspace/SmartViewProviders>

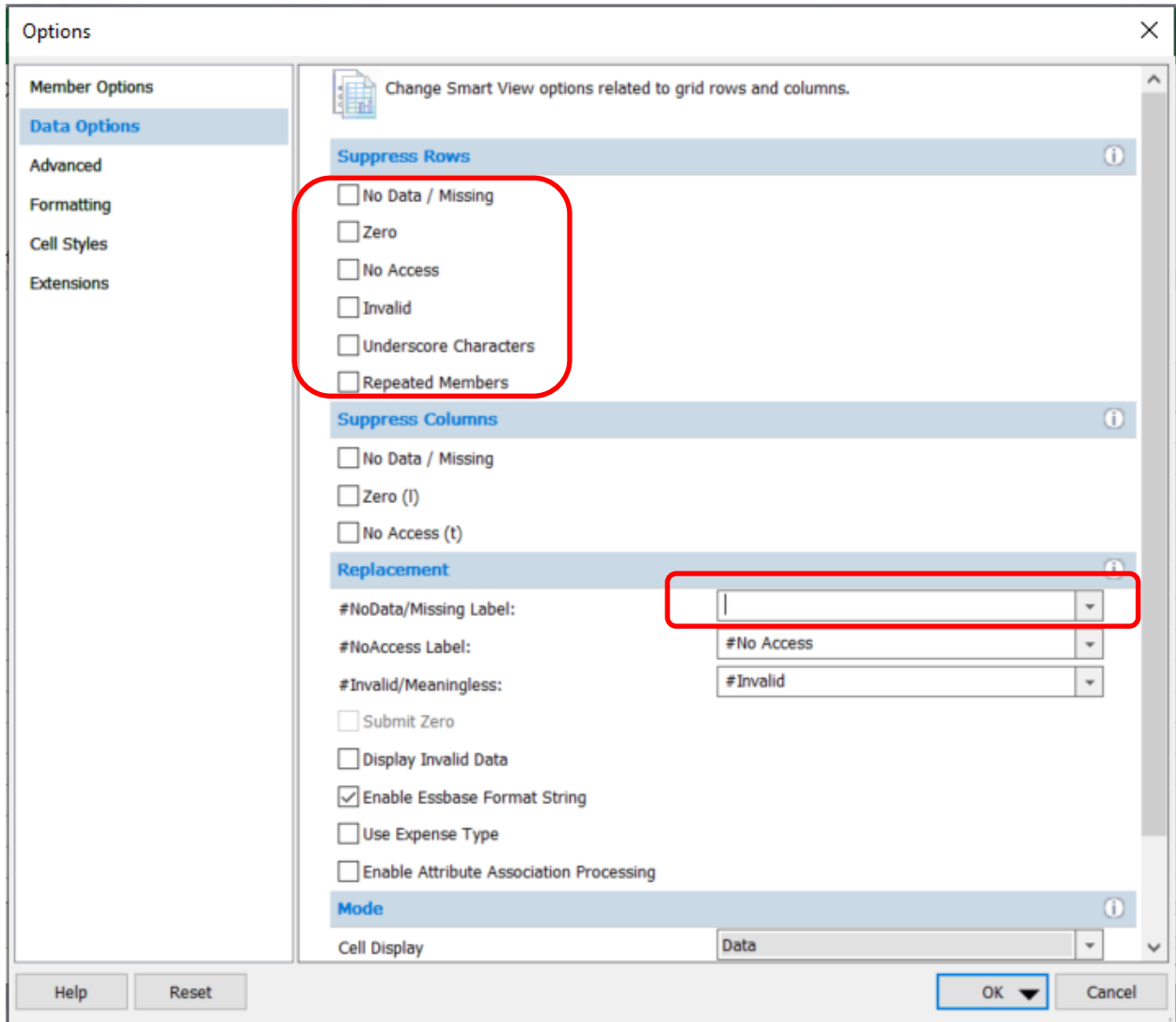


12. Click Data Options in the SmartView options pane

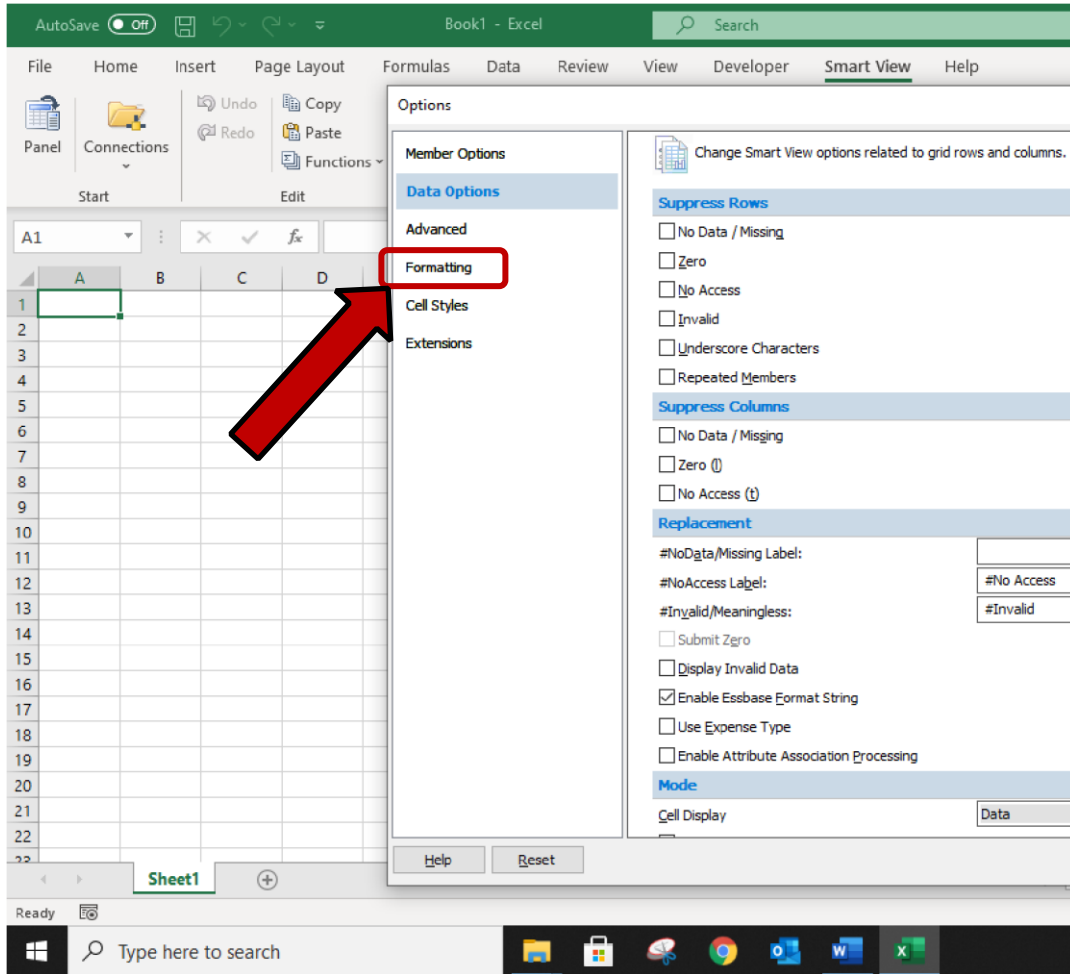


HYPERION TMG Salary Administration

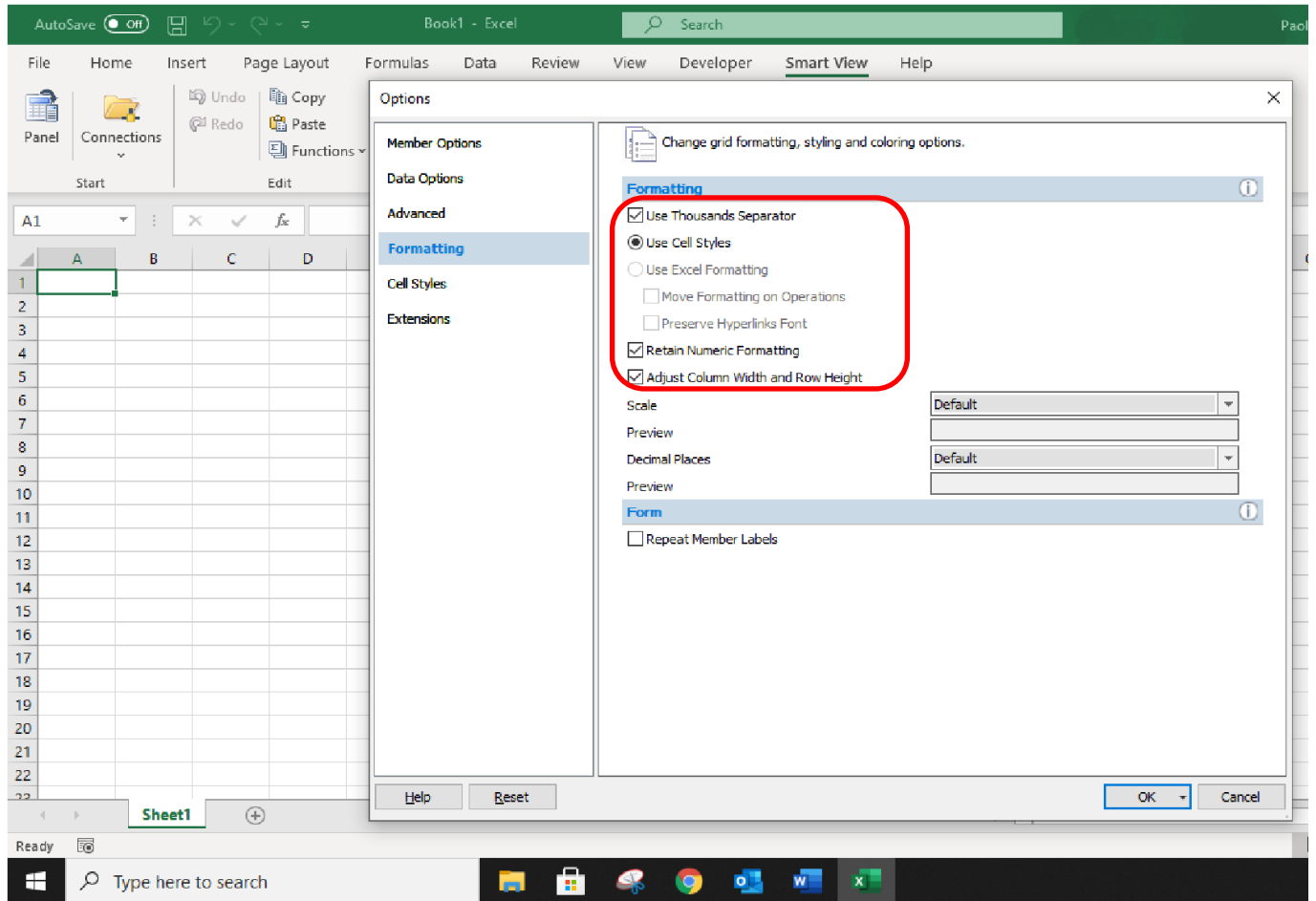
13. In the #NoData/ Missing Label box, select the word #Missing and delete it, leaving the box **empty**. Ensure all the check boxes under the Suppress Rows and Suppress Columns sections are **unchecked**.



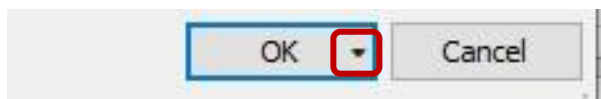
14. Click on the Formatting option on the SmartView Options Pane.



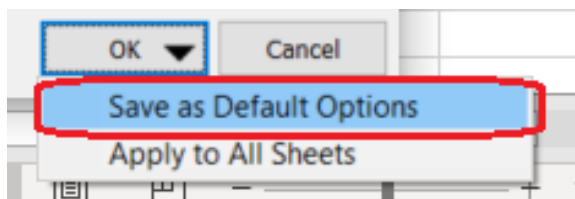
- 15. Check the Use Thousands separator check box, select the Use Cell Styles radio button, check the Retain Numeric Formatting and check the Adjust Column width and Row Heights check boxes.



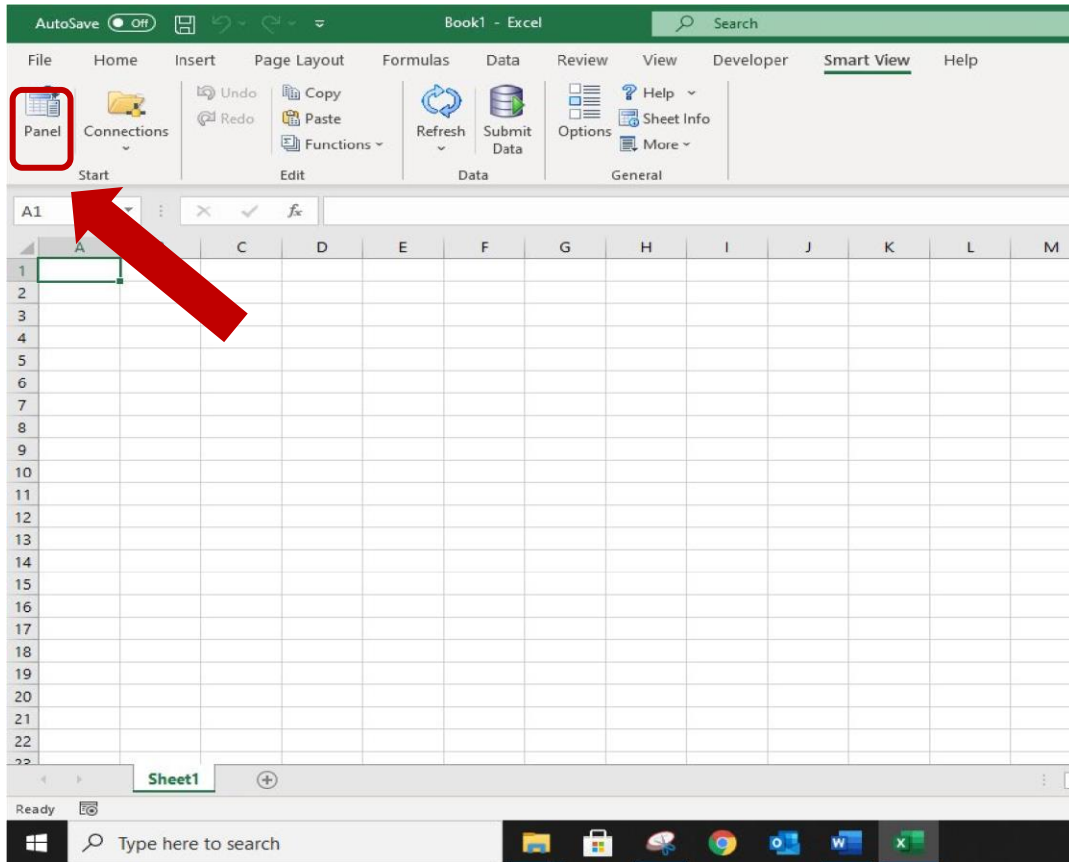
- 16. Click the dropdown arrow on the OK button.



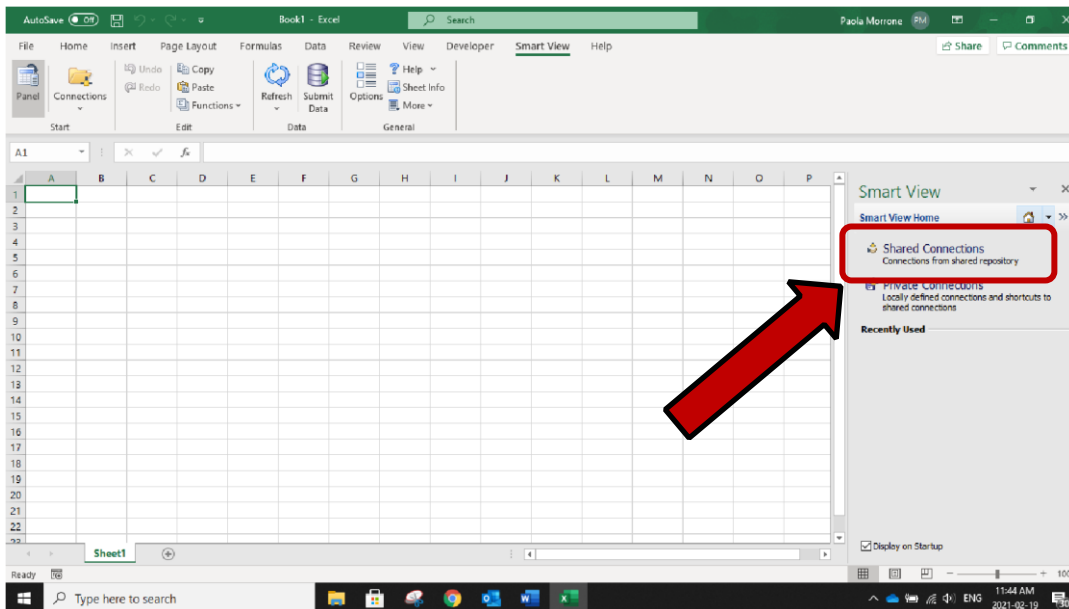
- 17. Select Save as Default Options.



18. The SmartView Options window closes. Click the SmartView Panel button on the Ribbon.

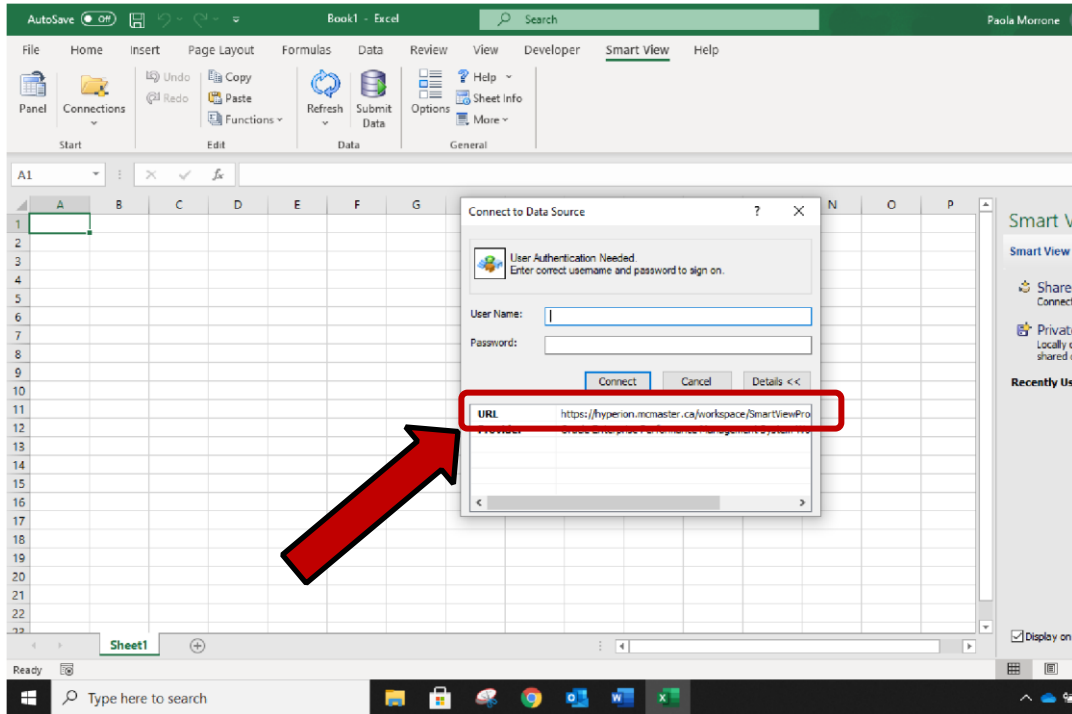


19. Click Shared Connections on the SmartView Panel.

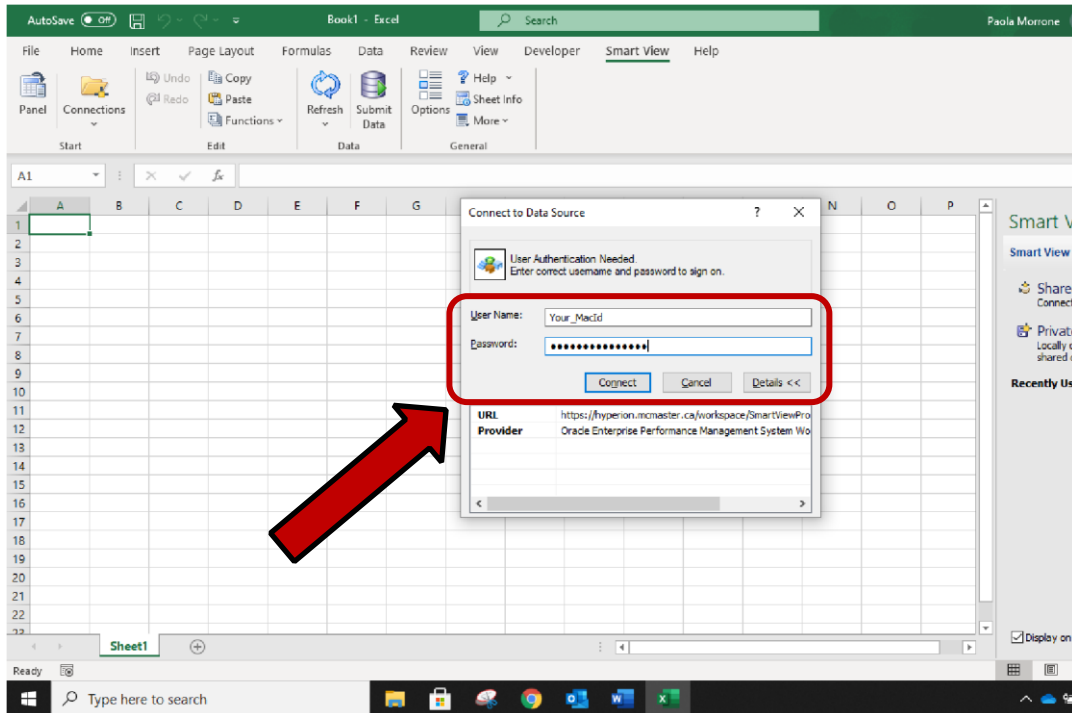


20. Check that URL in the popup is:

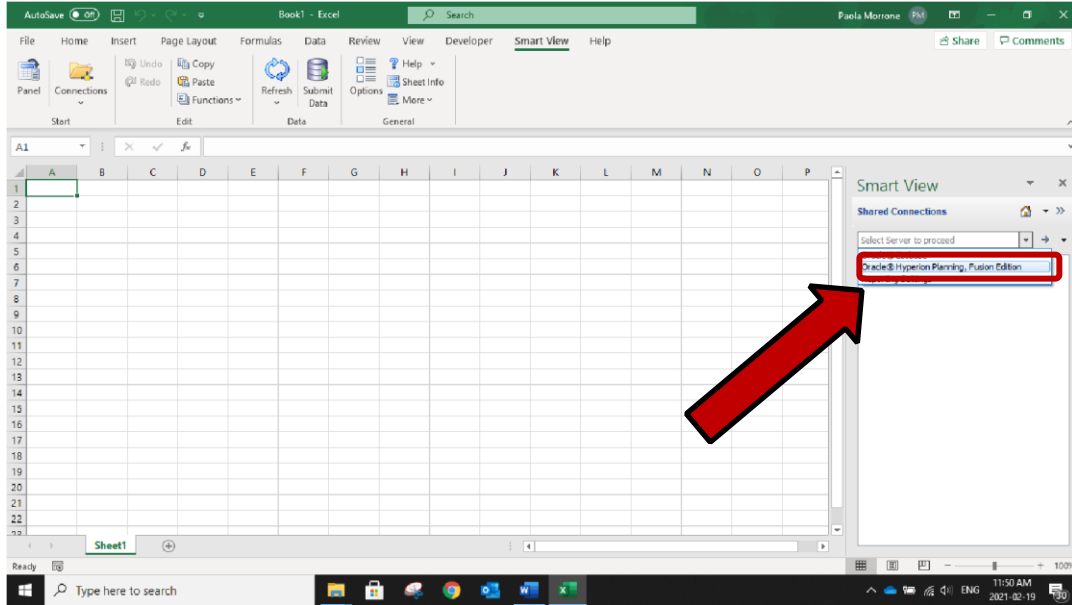
<https://hyperion.mcmaster.ca/workspace/SmartViewProviders>



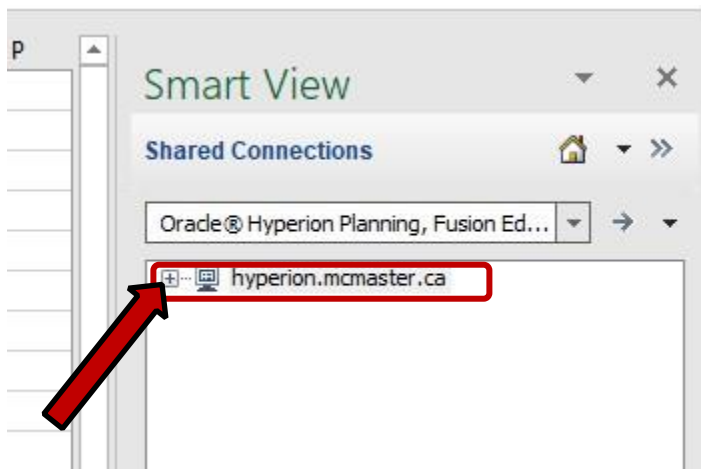
21. Enter MacId and password, Click Connect.



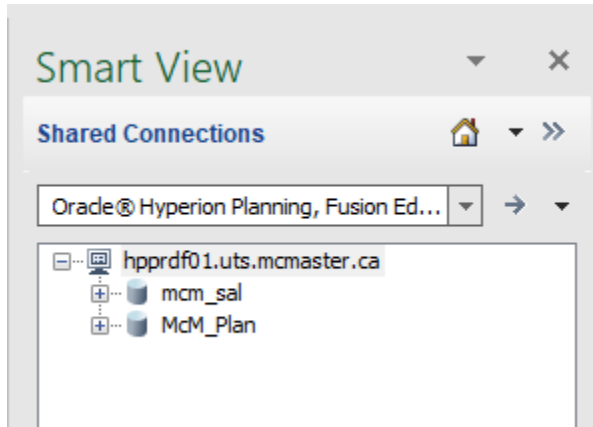
22. On the Panel, click on the Dropdown labeled “Select Server to Proceed” and select the option called: **Oracle Hyperion Planning, Fusion Edition**



23. The hyperion.mcmaster.ca server appears on the panel. Expand by clicking on the plus (+) sign next to it



24. Expand the **mcm_sal** application by clicking on the plus (+) sign

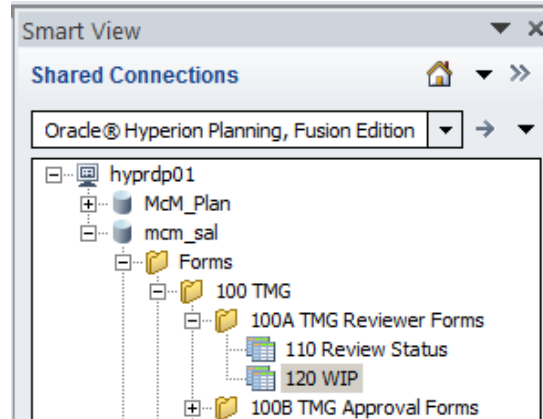


25. All forms for which you have access should be displayed and available for analysis and data entry

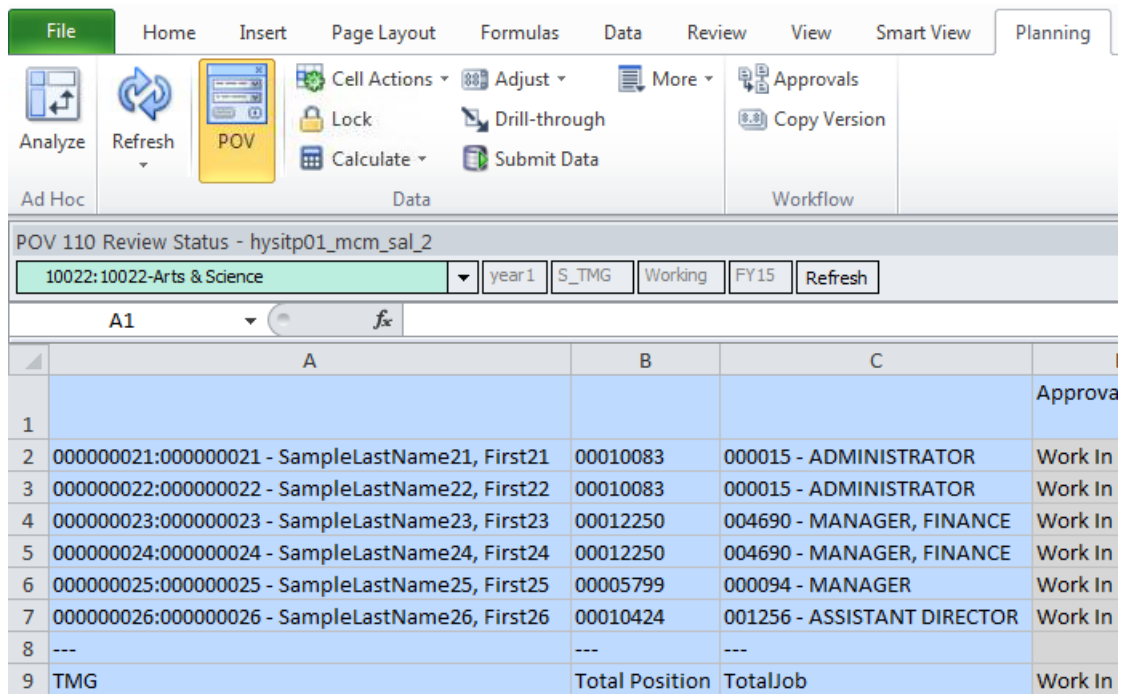
Smart View – Using TMG Reviewer Forms

Part A – Select Department to Review

1. Open the **120 WIP** (Work in Progress) form to begin the salary review process and assignment of Merit and performance ratings. Open the following folders in the Smart View panel:



2. Double click on **120 WIP** to open up the Form. Note: you may need to also click on the 120 – WIP Tab showing at the bottom of the page when it opens to see the listing of employees.

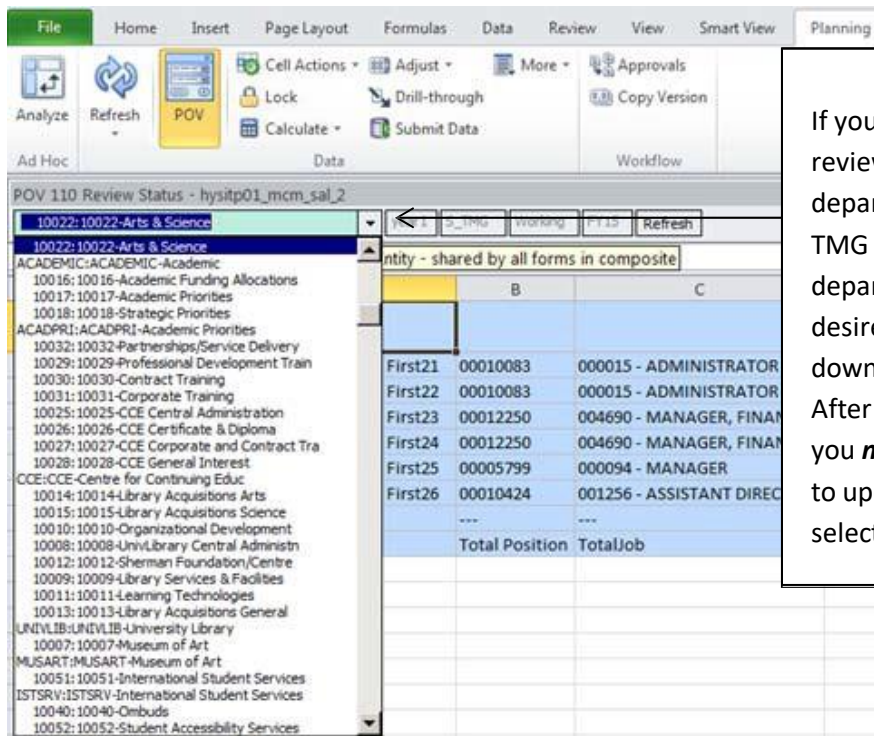


	A	B	C	
1				Approva
2	000000021:000000021 - SampleLastName21, First21	00010083	000015 - ADMINISTRATOR	Work In
3	000000022:000000022 - SampleLastName22, First22	00010083	000015 - ADMINISTRATOR	Work In
4	000000023:000000023 - SampleLastName23, First23	00012250	004690 - MANAGER, FINANCE	Work In
5	000000024:000000024 - SampleLastName24, First24	00012250	004690 - MANAGER, FINANCE	Work In
6	000000025:000000025 - SampleLastName25, First25	00005799	000094 - MANAGER	Work In
7	000000026:000000026 - SampleLastName26, First26	00010424	001256 - ASSISTANT DIRECTOR	Work In
8	---	---	---	
9	TMG	Total Position	TotalJob	Work In

3. The form will show a listing of TMG members within a specific department for which you have been given access. If you are completing the Review process for several departments, you may navigate between departments by selecting different numbered departments from the drop-down list

HYPERION TMG Salary Administration

(shown below). After making a department selection, click the Refresh button to view the TMG member data for the new department selected.



Entity - shared by all forms in composite	B	C
First21	00010083	000015 - ADMINISTRATOR
First22	00010083	000015 - ADMINISTRATOR
First23	00012250	004690 - MANAGER, FINAN
First24	00012250	004690 - MANAGER, FINAN
First25	00005799	000094 - MANAGER
First26	00010424	001256 - ASSISTANT DIREC
---	---	---
Total Position	TotalJob	

If you are completing the salary review process for multiple departments, you may navigate to TMG members in another department by selecting the desired department from the drop down menu.

After making the new selection, you **must** click the Refresh button to update the form to display the selected department's TMG data.

Note on Roll-Up levels and editing: Roll-up levels for a set of numbered Departments appear at the bottom of the list of numbered departments which report to it, rather than at the top of the list. Roll-up levels (e.g.: "ACADEMIC") are valuable tools to view data within a set of numbered departments, however, Hyperion only allows changes to be made on a numbered department level (e.g.: "10022"), not on a roll-up level.

Hyperion also requires that all edits to merit and performance ratings need to be made on Form **120 WIP** (Work in Progress).

E.g.: If you find that you are unable to input the required changes for an individual, you must ensure that all of the following are true:

- (1) You are on form **120 WIP**
- (2) You have selected a Numbered department from the drop down list (e.g.: "10022")
- (3) You have clicked the **Refresh** button since selecting the numbered department showing at the top of the screen

Part B – Update TMG Salary Increase Data

The following steps are required to be performed by TMG Reviewers. Some fields are editable and require input from the 'Reviewer'

1. Performance Rating (Column T)

T
Performance Rating

A drop-down menu provides you with available Performance Rating units to assign to the TMG member. Your choices are Achieving, Successful or Outstanding and Performance Improvement. Select the desired value. The Performance Rating will not be utilized in the calculation of the Salary with Merit, but is required for reporting purposes. You may enter one or many Performance Ratings prior to submitting your edits to Hyperion (see [step 3](#)).

	T	U
Merit%	Performance Rating	Salary w Merit
	<Enter Rating>	102,614.84
	<Enter Rating>	80,000.00

TIP: It is recommended to use the drop-down arrow and menu to input the Performance Rating, avoiding formatting issues which will result in error messages.

Additionally, you can copy-and-paste values from one cell to another. In this case, it is suggested that you copy from a cell in which you used the drop-down list to enter data.

2. Merit Applied (Column R)

R
Merit Applied

Merit is entered as a dollar value in Hyperion. Enter the dollars and cents, then Tab out of the cell. The Calculated Merit% cell cannot be edited, but will populate with a value once you have submitted this edit to Hyperion (see [Step 3](#)). You may enter one or many Merit Applied amounts prior to Submitting Data for any given Department.

R	S
Merit Applied	Calculated Merit%
2000.00	2.25%

HYPERION TMG Salary Administration

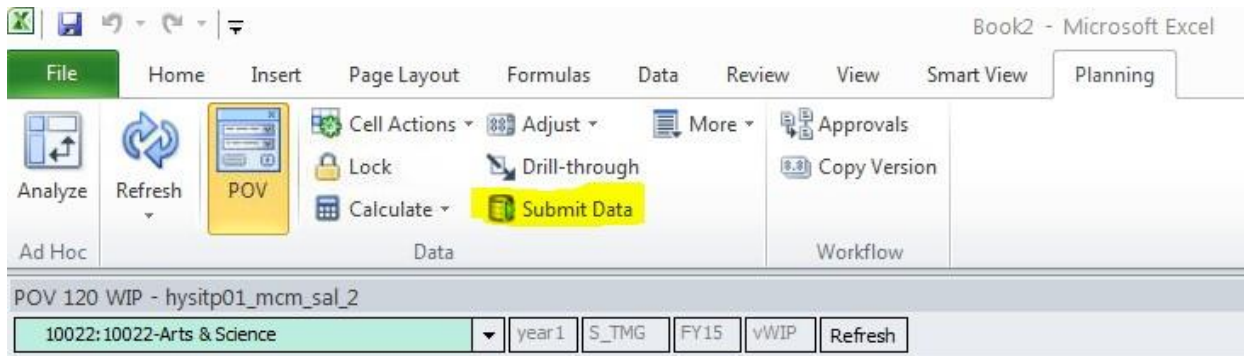
If required, the 'Merit Applied' dollar value can also be entered as an excel formula, referencing the value in column M for the same TMG member, if entering the Merit as a percent value is desired.

- E.g.: if a 2% Merit increase is desired for the TMG member on line 2, input the excel formula as: '=round(M2*.02,2)' (where "M2" is replaced by the actual row number of the employee you are working with; and the 'round' function ensures that only 2 decimal places are stored in the system) and hit Enter, or Tab out of the cell (the formula will convert to a dollar value in the cell).
- Once you have submitted your edit (shown in [Step 3](#)), the Calculated Merit% will populate with the same percent you used in your formula (if an unexpected appears in this field, review your formula)
 - Note: The formula will be viewable (by clicking on the cell) until you leave the Form. Next time you open the Form, only the merit dollar amount will remain (as Hyperion only stores the calculated value, not the formula itself).

M	N	O	P	Q	R	S
-Salary w ATB	Adj Comp Ratio	Max Base Salary Increase %	Max Revised Compa	Max Merit \$	Merit Applied	Calculated Merit%
88859.49	88.87	#Missing	#Missing	#Missing	=ROUND(M2*.02,2)	

Note: As there is no ATB applied in 2019, the salary displayed in Column L (Salary w ATB) is the same as the Regular Salary in Column E.

3. Click the **Submit Data** button located at the top of the screen to save update(s).



Pressing the Submit Data button **saves** your updates to the Hyperion database and **triggers** the calculations for **all TMG members** showing on the form. The form will be updated with new salary calculations (and Merit %) and may take a short while to refresh.

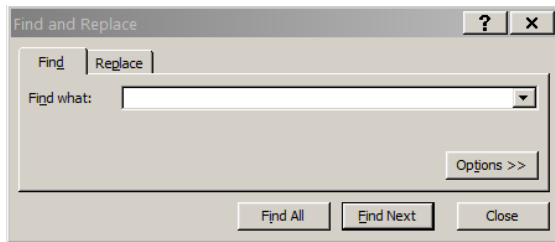
You can press Submit Data multiple times as needed when further edits are made to Performance Ratings or Merit Applied. Once you have submitted data, your latest edits have been saved in Hyperion.

If you need to log out of Hyperion and resume working on the same form prior to marking any TMG members as Ready for Approval (in [Step 4](#)), your changes will still be reflected when you next resume working, if you have clicked Submit Data prior to exiting Smart View.

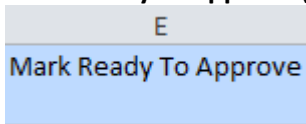
HYPERION TMG Salary Administration

Tip: Although you cannot sort the Hyperion listing of TMG members (e.g.: by last name), you can use Excel's Find feature to quickly locate a specific TMG member in your department list

Hint: press [Ctrl + F] to open the Find pop-up window; search on employee ID or name



4. Mark Ready to Approve (Column E)



The Ready to Approve function moves the selected employees to the next approval form. **TMG members who have been marked and submitted as 'Ready to Approve' will no longer be accessible to a TMG Reviewer to make any changes.** If you have a manager or senior administrative lead that needs to review the information before being rolled up to the Vice-Presidents or President level for approval, ensure this is completed before undergoing this step.

After a TMG member's Performance Rating and Merit Applied have both been entered and the calculation of Merit Applied has been reviewed after pressing the Submit Data button, and the salary information for the TMG member is ready for review and approval by the designated department/area TMG Approver, change the ready to approve status in Column E to 'Yes'.

You may mark one or many TMG members as Ready to Approve prior to clicking the Submit Data button (see [step 5](#)).

TIP: Use the pull down menu to select the Yes option when ready desired (as formatting is critical). If you are updating multiple TMG members at one time, you may copy and paste the Yes value from the initial cell into subsequent cells.

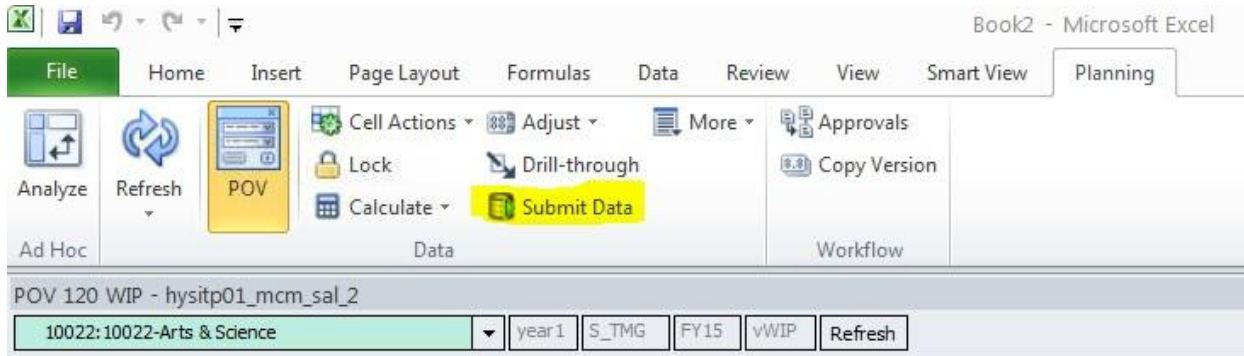
A	B	C	D	E	
			IsWIP	Mark Ready To Approve	Regu
000000021:000000021 - SampleLastName21, First21	00010083	000015 - ADMINISTRATOR	Yes	Yes	
000000022:000000022 - SampleLastName22, First22	00010083	000015 - ADMINISTRATOR	Yes	Yes	
000000023:000000023 - SampleLastName23, First23	00012250	004690 - MANAGER, FINANCE	Yes	Yes	
000000024:000000024 - SampleLastName24, First24	00012250	004690 - MANAGER, FINANCE	Yes	No	
000000025:000000025 - SampleLastName25, First25	00005799	000094 - MANAGER	Yes	No	
000000026:000000026 - SampleLastName26, First26	00010424	001256 - ASSISTANT DIRECTOR	Yes	No	

5. Click the **Submit Data** button located at the top of the screen to save update(s).

TMG members whom were marked 'Ready to Approve' disappear from form **120 WIP**. These members will then appear on the form **130 Ready to Approve**.

HYPERION TMG Salary Administration

If an Approver has the form open, they may need to click Refresh on their form to see the affected TMG members appear.



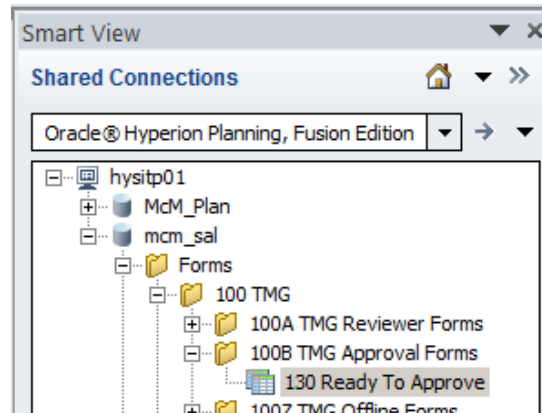
Important Note: TMG members who have been moved to the 130 Ready to Approve form will no longer be accessible to a TMG Reviewer to make any changes.

If further changes are required, the TMG Approver must move the TMG member(s) back to the 120 WIP form for further edits to be completed (covered under the Using TMG Approver Forms section).

Smart View – Using TMG Approver Forms

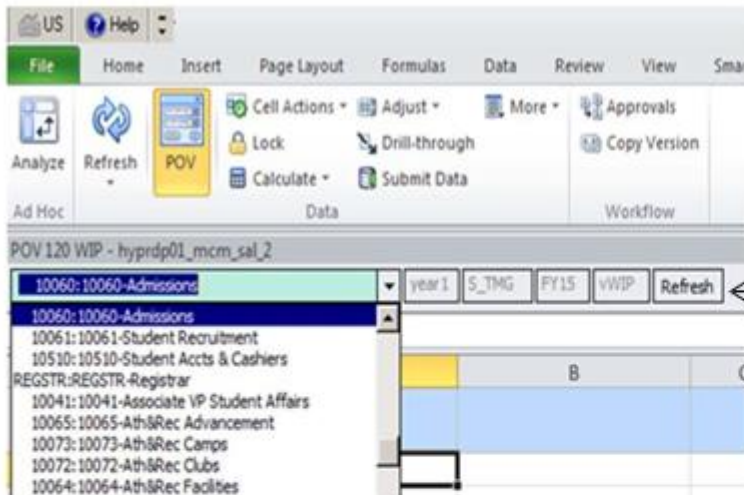
Part A – Selecting the TMG Approval Form

1. Open the TMG **130 Ready To Approve** form to begin the salary approval process. Follow the file path shown in the Smart View panel:



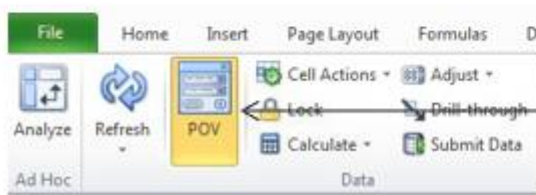
2. Double click on **130 Ready To Approve** to open the form.

The form will open to show a listing of TMG members within a specific department for which you have been given access.



If you are completing the salary review process for multiple departments, you can navigate to the TMG members in those departments by selecting a different department from the drop down menu.

Then you must click the Refresh button to update the form to display the selected department's data.



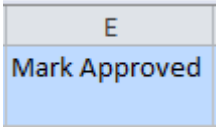
If the Department drop-down selection is not available, ensure the POV button is selected on the Data Menu.

HYPERION TMG Salary Administration

Part B – Approve Salary Increase Data

Upon review of the data that has been input by the Reviewer, the Approver has the option to [approve the data](#) as entered or [request for changes to be made](#).

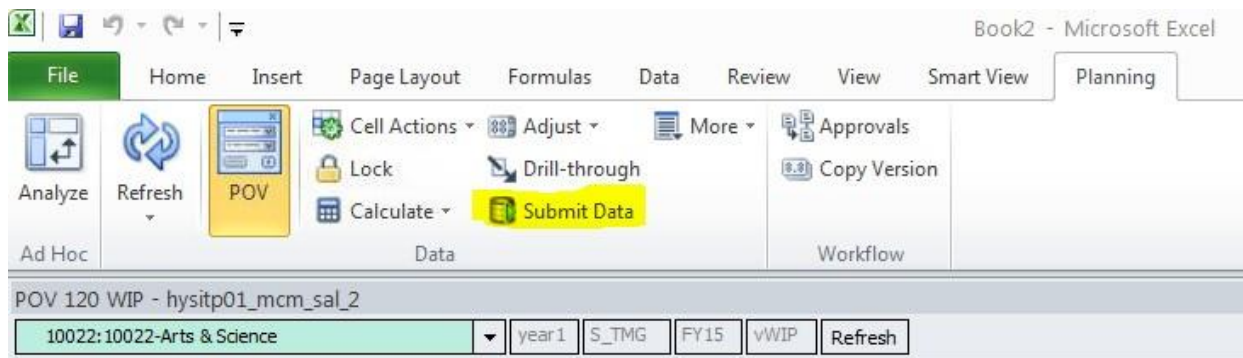
1. Mark Approved (Column E)



Providing the Approver agrees with the data that has been input by the Reviewer in the WIP form, the approver simply needs to change this column value to 'Yes', using the pull-down menu. If, however, an Approver notes there are changes needed to either the Merit Applied or the Performance Rating, they should instead refer to the steps outlined below in Part C.

	A	B	C	D	E	
1				Ready to Approve	Mark Approved	Regu
2	000000021:000000021 - SampleLastName21, First21	00010083	000015 - ADMINISTRATOR	Yes	Yes	
3	000000022:000000022 - SampleLastName22, First22	00010083	000015 - ADMINISTRATOR	Yes	Yes	
4	000000023:000000023 - SampleLastName23, First23	00012250	004690 - MANAGER, FINANCE	Yes	No	
5	000000024:000000024 - SampleLastName24, First24	00012250	004690 - MANAGER, FINANCE	Yes	No	
6	000000025:000000025 - SampleLastName25, First25	00005799	000094 - MANAGER	Yes	No	
7	000000026:000000026 - SampleLastName26, First26	00010424	001256 - ASSISTANT DIRECTOR	Yes	No	

Click the **Submit Data** button located at the top of the screen to save update(s). This will move all approved TMG member information to the **140 Approved** form to be confirmed by the Provost's Office and then processed by Human Resources.



Important Note: Once a TMG member is marked “Yes” and the **Submit Data** button is pressed, the TMG member’s row of data will disappear from the **130 Ready To Approve** form, and at that point they will appear on the **140 Approved** form.

HYPERION TMG Salary Administration

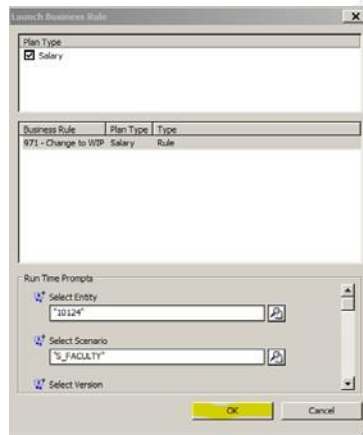
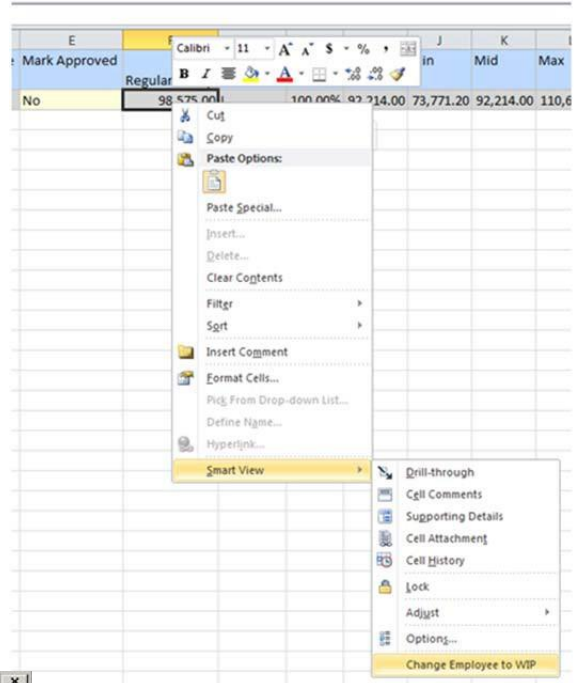
2. Push Back TMG Salary Increase Data to 120 WIP (Work in Progress) Form

All data changes to the Performance Ratings and Merit Applied must be made on the **120 WIP** form.

If an Approver requires changes to be made to the Performance Rating or Merit Applied entered for a TMG member, they must send the data back to the **120 WIP** form for revisions, regardless of whether they plan to make the required change themselves or have a Reviewer complete necessary the update.

To do so, please complete the following steps:

1. **Right click** on the Mark Approved (Column E) cell for the TMG member requiring a data change.
2. Click the **Smart View** option at the bottom of the list.
3. Click the **Change Employee to WIP** option at the bottom of the list.
4. When the *Launch Business Rule* window opens, click the **OK** button.

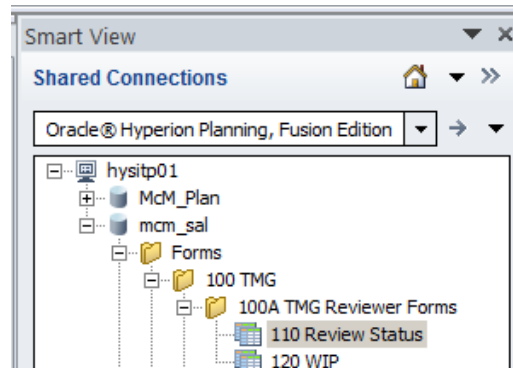


5. The selected TMG member's data will now be available in the **120 WIP** (Work in Progress) form for revisions and resubmission for approval. The individual's data will no longer be displayed on the **130 Ready To Approve** form.

Smart View – Review Status Form

As a TMG Reviewer or Approver in Hyperion, you have the option to open the **110 Review Status** form. This form provides the user with an overall **view only** summary of the status of each TMG member within the Salary Administration process. It summarizes which form each TMG member is currently in, as well as displaying some salary summary data.

All changes to the Performance Rating or the Merit Applied are made only on the **120 WIP** form (see the [‘Reviewer’ section](#) of the Job Aids for more details on making changes), hence why this is a **view only** form.



Approval Status (see column ‘D’)

Column D provides the approval status, which corresponds to a specific form in Hyperion (see descriptions below).

	A	B	C	D
				ApprovalStatus
1				
2	000000021:000000021 - SampleLastName21, First21	00010083	000015 - ADMINISTRATOR	Ready To Export
3	000000022:000000022 - SampleLastName22, First22	00010083	000015 - ADMINISTRATOR	Ready To Export
4	000000023:000000023 - SampleLastName23, First23	00012250	004690 - MANAGER, FINANCE	Ready To Export
5	000000024:000000024 - SampleLastName24, First24	00012250	004690 - MANAGER, FINANCE	Approved
6	000000025:000000025 - SampleLastName25, First25	00005799	000094 - MANAGER	Ready To Approve
7	000000026:000000026 - SampleLastName26, First26	00010424	001256 - ASSISTANT DIRECTOR	Work In Progress

- Work in Progress – TMG member’s data is still being edited or reviewed within the **120 WIP** form and has not been marked as *Ready to Approve*
- Ready To Approve – TMG member’s data is awaiting approval on the **130 ReadyToApprove** form. The Approver can choose either to Approve or to send the TMG member’s data back to the **120 WIP** form for further revisions
- Approved – TMG member’s data has been approved and is awaiting final confirmation on the **140 Approved** form for review by Human Resources Services. **Note: this Form is only viewable to Human Resources Services**
- Ready to Export – TMG member’s data has been confirmed by Human Resources Services, and is staged for export from Hyperion by Human Resources and sits on the **150 ReadyForExport** form. **Note: this Form is only viewable to Human Resources**
- Exported – TMG member’s data has been exported from Hyperion and is ready to be uploaded back into Mosaic by Human Resources Services; data is sitting in the **160 Exported** form. **Note: this Form is only viewable to Human Resources**

HYPERION TMG Salary Administration

Column Summaries

O	P	Q	R	S	T	U
ATB \$ Applied	-Salary w ATB	Adj Comp Ratio	Max Base Salary Increase %	Max Revised Compa %	Max Merit \$	Merit Applied
600.00	60,600.00	100.20	3.38	112.25	2,028.00	1,200.00
496.00	50,096.00	103.54	3.38	112.25	1,676.48	992.00
664.97	67,161.77	80.80	4.50	103.38	2,992.36	1,329.94
430.00	43,430.00	104.50	3.38	112.25	1,453.40	860.00
985.75	99,560.75	107.97	3.38	112.25	3,331.84	1,971.50
1,025.00	103,525.00	91.90	4.50	103.38	4,612.50	2,050.00
4,201.72	424,373.52	588.91	22.52	655.76	16,094.58	8,403.44

In the **110 Review Status** form, you will notice that Hyperion has provided some summary data in the bottom row of each column.

Disclaimer: Please note that Hyperion utilizes various columns for calculations throughout for various purposes. As such, you will notice that not all column summaries in the Review Status form are useful for providing summary data, and percentage-based fields do not total to meaningful data (however, all dollar-based totals do sum accurately).

Column Summaries of Interest:

- **ATB \$ Applied** (Column K) – This column provides the dollar value of the ATB salary increase applied within the department. As there is no ATB applied in 2019, this column will have no values.
- **Salary w ATB** (Column L) - As there is no ATB applied in 2019, the salary displayed in this column is the same as the Regular Salary (Column E).
- **Merit Applied** (Column Q) – This column provides a total of Merit dollars allocated for all TMG members within the department.
- **Calculated Merit%** (Column R) – This column provides the average of all Merit percentages within the department.
- **Adj Sal to Min** (Column V) – Employees whose salaries fall below the new minimum of their salary range after the application of the merit increase provisions, will have their salaries increased to the band minimum. This column provides the TMG members total salary including any adjustments to minimum that were required.

Tracking the Merit Pool Allocations

110 - Merit Available worksheet gives a running total of the Merit Available to Allocate, the Merit already allocated, and the remaining available Merit. This worksheet is viewable on all Reviewer and Approver forms (e.g.: Form 110, 120, 130) for quick reference, and is accessed by tabs at the bottom of the open form. The worksheet is updated each time the Submit Data button has been pressed and the Hyperion calculations execute.

POV 110 Review Status - hysitp01_mcm_sal_1

10022:10022-Arts & Science

C8

	A	B	C	D	E	F
1				Merit Available to Allocate	Merit Allocated to Employees	-Merit Available
2	TMG	Total Position	TotalJob	9,454	8,403	1,050

34

35

110 - Merit Available 110 - Review All

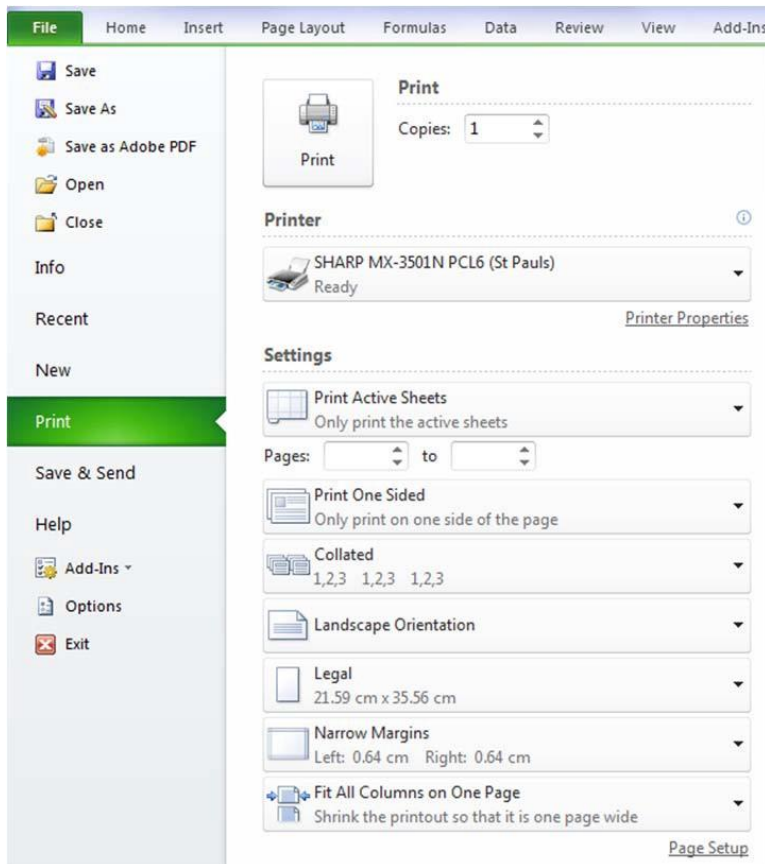
Smart View - Saving and Printing

If you do want to save an 'offline' copy of the Hyperion form you've been reviewing, click on the 'File' menu in Excel and select 'Save As', and then follow the normal Excel steps to name and save your file in a location of your choice.

A saved copy of a Smart View worksheet will be disconnected from the Hyperion database and would not allow any future changes made to the spreadsheet to be automatically loaded to Hyperion.

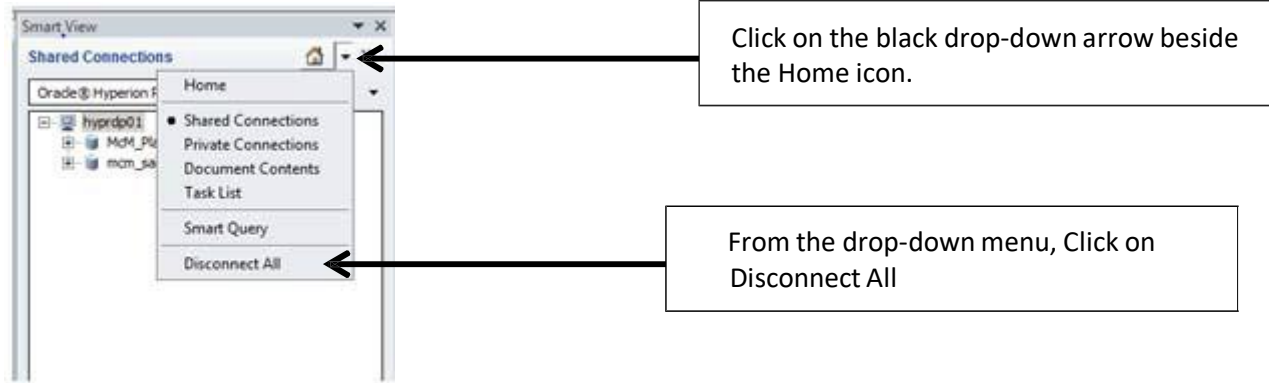


If you want to print a copy of the Hyperion form, click on the 'File' menu in Excel and then select 'Print'. You will need to set the print options to have the spreadsheet print in the manner you would like. An example of settings is provided here (note: your options may vary depending on your printer):



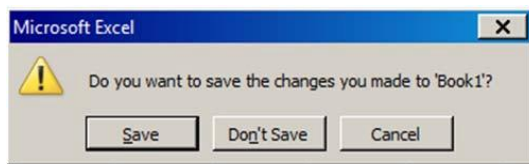
Disconnecting from Hyperion Smart View and Exiting Excel

To exit Hyperion Smart View, use the Disconnect All option.



You can now exit Excel as you normally would (e.g.: by pressing the X at the top right of Excel; or by selecting the File menu, then Exit).

Note: You may be prompted to save your Excel workbook when exiting:



Unless you want to save an 'offline' copy of the data you've been working with for your own records, you can simply click the 'Don't Save' button, and Excel will close. Remember that salary admin data is stored in the Hyperion database; therefore you do not have to keep an offline copy.

If you do want to save an 'offline' copy of the spreadsheet you've been working on, click the Save button; then follow the normal Excel steps to name and save your file in a location of your choice.

A saved copy of a Smart View workbook will be disconnected from the Hyperion database and would not allow any future changes made to the spreadsheet to be automatically loaded to Hyperion.