Welcome

Message from Krishan Prasad

Welcome to the May edition of The Hyperion Report.

In this edition we are pleased to focus on the Budget and Business Intelligence team. Hear from Graham Moon about the focus of his team, some current projects and an insight into Business Intelligence.

Graham’s team is one of a number that work together to bring you the Hyperion Business Performance Management system and we will focus on these in future editions. Some of these teams include:

- Financial Integrity and Support Unit (OCA)
- ICT – Helpdesk, Operations, and Operations teams
- Training, Communication and Support (FOS)
- HR – Business and IT Support teams and
- Strategic Management Accounting and Reporting

Other articles featured in this edition include insights into latest developments in Hyperion Reports, Intelligence and HR Reports and Workforce Planning.

We hope you enjoy our news update.

Krishan Prasad, Manager - Training, Communication and Support

Hyperion User Group (HUG)

A Hyperion User Group will be held in September as part of a conference including PeopleSoft and Spendvision.

What would you like to see this year?

Please send your suggestions to Krishan Prasad

Hyperion and Internet Explorer

Some Users have been reporting issues with Hyperion when using IE8.

Please note that at this stage Hyperion only supports IE6 and IE7.
In Focus

Business Intelligence – Graham Moon, Director Budget and Business Intelligence

Since Oracle acquired Hyperion it has been active with further acquisitions and the development of Business Intelligence (BI) applications. These latest applications can provide managers with a single view of performance against goals from various source systems. Having one version of the truth is critical for decision making.

Having one set of financial and non-financial key performance indicators (KPIs) that we can rely on can provide performance management information that can be the basis for discussion on what the issues are and what the University needs to do to address them.

Our team at the University’s Budget and Business Intelligence Office (BBI) aims to provide a better business focus on BI strategy, provide technology enablement recommendations for BI, improve performance management information and improve business partnership with ICT. We also provide system administration for Balanced Scorecard and Hyperion Planning. Some of our current projects are:

- Decision Support System (DSS)
- Workforce Planning Pilot
- Performance Management reporting
- Research reporting (HERDC) and
- FTE reporting

This edition’s In Focus article describes business intelligence and some of the essential ingredients for improved performance management information. The University has made a significant investment in Oracle applications which provide a ready platform to now consider a comprehensive set of improved BI tools.

What is Business Intelligence?

“Business Intelligence (BI) encompasses the processes, tools and technologies required to transform enterprise data into information, and information into knowledge that can be used to enhance decision making and to create actionable plans that drive effective business activity” (Gartner Group).

Why do we need a Business Intelligence (BI) Strategy?

Business intelligence and performance management can provide us with a greater insight into managing the University. BI tools and technologies can leverage and analyse existing information, key performance indicators and business information metrics.

BI tools solutions can also help organisations become more efficient and effective. However, there is more to BI than technology solutions. A lack of a BI strategy can result in inconsistent BI deployments, difficulties in managing various “silo” information systems, lack of standardisation of definitions, processes and tools.

A comprehensive strategic approach is not only required for technology, but also process improvements, data quality and governance. This strategic approach in an organisation also needs to have an owner.

Business Intelligence Competency Centre (BICC)

To enhance the development of BI strategy business representatives need to be actively involved in BI systems development and various organisations today are establishing a BICC model. It provides a central location for driving and supporting the organisation’s overall BI strategy. There are different BICC models established in organisations and usually they are cross functional teams. It is recommended a BICC report to the CFO or COO, depending on the type of organisation, yet working in collaboration with Information Technology (IT).

University's Budget and Business Intelligence Office (BBI)

To increase business representation in BI strategy and to develop a BICC like model staff from the Budget Office, directly involved with Hyperion ongoing developments, have amalgamated with two staff members transferring from Financial Operations & Systems (Vicki Hatt) and ICT (Stijn Hooребelke). The BBI office reports to the Chief Financial Officer (CFO). The BBI Office is currently working closely with ICT and other areas of the University with the Decision Support project (refer below).

Decision Support Project Objective

To provide a technology solution that will allow for the access of Key Performance Indicators (KPIs) information through an easily accessible web front to the key decision makers in a timely and meaningful way. The data to be accessed is that which is currently captured in the student, course, financial, HR and research management systems. Such solution to provide the ability to produce with limited manual intervention, analytical reports.

Data Warehouse and Data Integration

The quality of information provided by analytical environments can be described in terms of how well integrated the data is within them. When data from multiple systems can be integrated, it provides users with access to all relevant information within an organisation. Thus users can ask cross-functional questions and the answers provide a complete picture of the business conditions. This enables them to make a fully informed decision.

Best Practices for Data Quality Improvement

Data quality must be primarily the responsibility of the business community, not IT. The proven way to reap benefits of high quality data is to create correctly the first time. Poor data can lead to mistrust of data warehouse
information. “Siloed” systems and manual information gathering processes can also hinder day-to-day business operations, making detailed trend analyses nearly impossible.

**Solution:** Employees at various organisational levels can track and are able to use quality information related to key performance indicators.

**BI and Performance Management**

“Management reports must measure against business strategy and provide useful information on the company’s performance. Measurement drives behaviour. If you measure proactively then you manage proactively” (Dr Paul Walsh AGSM).

**Summary**

Bill Hostmann, research analyst with Gartner Research

“You know, you can put the right information at the right time that’s consistent, that’s timely, that’s accurate, that presents the model of your business, but in order for it to be of value, it has to inform and compel a decision and action. Otherwise it’s just a useful presentation of interesting information and not really of value in terms of improving business performance”.

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**Latest news and announcements**

**SUGLQ105 – Search using RC by hierarchy**

As a result of user feedback, the Responsibility Centre by Hierarchy search field has been added to the Hyperion Finance General Ledger Query SUGLQ105. This field will allow users to select Responsibility Centres (RCs) using the summary tree hierarchy.

**This new functionality is now operational.**

This new search field means you’re able to choose the RCs either by selecting them in the "Resp Centre" selection box OR by using the:

![Resp Centre by Hierarchy](image)

Please note the following:

1. You may either use the "Resp Centre" OR the "Resp Centre by Hierarchy" search field but not both in any one search.
2. To use the "Resp Centre by Hierarchy" method, tick off the "Resp Centre" box.
3. To swap methods, clear the results of the "Resp Centre by Hierarchy" search before using the "Resp Centre" search.
4. If you don’t have access to an RC or summary node you will not get any results.
5. You can cherry pick the nodes/RCs using the "Resp Centre by Hierarchy" option BUT they must be at the same level in the tree. You can also choose multiple summary nodes using the “Resp Centre by Hierarchy” by just choosing “Add” multiple times.
6. The sort order on the Fiscal Year field is now descending so that the most current year appears at the top.

**How do I use the “Resp Centre by Hierarchy” search field?**

You will initially see the following screen:
1. Select A0000_TOTAL_USYD Responsibility Centre in the "Resp Centre by Hierarchy" search field and click on the "+/-" button on:

2. Keep drilling through the tree by selecting the appropriate RC summary node and clicking on the "+/-" button on until you reach the RC summary node/leaf you need.

3. Add your selected RC summary node/leaf to the result box by clicking on the "Add" button. Note you are able to cherry pick multiple RC nodes/leaf if you wish.

4. To do another search, or to search using "Resp Centre" search field, clear the results in the "Resp Centre by Hierarchy" results field by clicking on the "Clear" button.

5. Click on to process your query.

6. Select your preferred format to view results as usual.

If you have any issues with using this new functionality, please log a call with the ICT Help Desk on 02 935 16000 or email support@usyd.edu.au and they will assign the issue to the appropriate Hyperion support team.

**SUGLQ110 – Search using RC by hierarchy**

As a result of user feedback, the Responsibility Centre by Hierarchy search field has been added to the Hyperion Finance General Ledger Query SUGLQ110. This field will allow users to select Responsibility Centres (RCs) using the summary tree hierarchy.

This new functionality is now operational.

This new search field means you’re able to choose the RCs either by selecting them in the "Resp Centre" selection box OR by using the: . Please note the following:

1. You may either use the "Resp Centre" OR the "Resp Centre by Hierarchy" search field but not both in any one search.
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3. To swap methods, clear the results of the "Resp Centre by Hierarchy" search before using the "Resp Centre" search.
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5. Click on to process your query.
6. Select your preferred format to view results as usual.

If you have any issues with using this new functionality, please log a call with the ICT Help Desk on 02 935 16000 or email support@usyd.edu.au and they will assign the issue to the appropriate Hyperion support team.
Hyperion HR Queries

All Hyperion users are now able to access the Hyperion HR Queries and Line Manager Position queries.

From Thursday 30th April, 2009 a new folder (Hyperion HR Queries) appeared on your folders list.

The security for the HR Line Manager Position reports means that reports run for people who directly report to you. So if you have direct reports you will now be able to get data from these reports.

If you have no direct reports, the reports will come back with no records and you will not have any need to run them. Just ignore the reports in this folder.

If you have any issues with the data displayed via this new functionality such as missing or extra records, please contact your HR Service Centre Team Member or HR Relationship Advisor http://www.usyd.edu.au/sydneypeople/contact/index.shtml for your Faculty/Unit.

New Pivot – Salary Journal Summary Pivot

Did you know the Salaries Journal Summary Pivot is now available in SUGLQ001 and displays a summary of all transactions processed to salary classification? The transactions are summarised by journal source and classification category and will assist you in reconciling the detail salary data to the result in the summary income and expenditure reports (e.g. SUGLR047 and SUGLR545).

New Query – SUGLQ002 FTE by Finance RC Structure

A new report has been created for users who need to do a lot of analysis around salary costs and FTE. Christina Fava and Vicki Hatt have developed the new Hyperion query that rolls up the T2 FTE data using the General Ledger hierarchy. Queries in the Hyperion HR Queries folder are based on the T2 C Level hierarchy which isn't necessarily the same as where people are costed to in the GL. The new report is more orientated around tracking FTE by where they are costed to in the General Ledger rather than C level in T2.

The report is aimed at "senior analyst" users who need to do a lot of analysis around salary costs and FTE. This report is released to a limited set of users rather than all Hyperion Finance users. To gain access to the report, users will need to complete a workshop to explain the fields in the report and how to best use the report.

The focus of the report is reporting actual FTE by RC structure, therefore there are limited HR oriented fields in the result set of this query. It is not designed to provide workforce planning type of analysis as this is currently a separate project being developed in Hyperion Planning working with a pilot faculty. It is also not intended to replace any of the existing HR reports. Please contact either Vicki Hatt on vhatt@usyd.edu.au or Christina Fava on cfava@usyd.edu.au for more information.
New Report – SUGLR060 Analysis Report by RC and Class

A new report is now available in Hyperion that displays responsibility centres for the class codes selected. The report is available in the following directory: Hyperion Financial Reporting – Finance Reports – 1. Financial Management Reports.

Here is a sample of the report layout:

The User Point of View allows you to select the following parameters:

- Class Codes
- Years
- Scaling
- Responsibility Centres
- Project Codes

You can run the report for any level in the classification trees or for any CUSTOM_CC.

CUSTOM_CC’s contain customised calculations that cannot be retrieved directly from the tree hierarchy. For example, to see the equivalent of the Net Operating Margin on SUGLR047 or SUGLR545, choose the CUSTOM_CC called “NetOperatingMargin”. To see the equivalent of Closing Balance choose YTDSurplus(Deficit).
Here is a quick list that shows you some of the common CUSTOM_CC’s:

<table>
<thead>
<tr>
<th>SUGLR545/SUGLR047 TOTAL</th>
<th>Custom CC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing Balance</td>
<td>YTDSurplus(Deficit)</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>TotalIncome</td>
</tr>
<tr>
<td>Total Non Salary Expenditure</td>
<td>TotalNonSalary</td>
</tr>
<tr>
<td>Total Expenditure</td>
<td>TotalExpExclDepn</td>
</tr>
<tr>
<td>Operating Margin</td>
<td>OperatingMargin</td>
</tr>
<tr>
<td>Net Operating Margin</td>
<td>NetOperatingMargin</td>
</tr>
<tr>
<td>Net Financial Performance</td>
<td>NetFinancialPerformance</td>
</tr>
</tbody>
</table>

The report displays the “children” of the responsibility centres selected. Click on the arrow-head to expand the rows if required.


This is replica of the report currently available in the Planning folder. The actuals in the new report will be updated on a daily basis.

**Amended Report – SUGLR053**

Hyperion Finance report **SUGLR053 I & E Summary by RC (including Budgets)** has been modified to include the same reporting lines as SUGLR047.

**SUGLR047 and SUGLR545 Related Content and Query Features**

Full functionality of Finance Queries (Interactive Reporting) is now available on the Related Contents drill-down output of the Financial Management Reports SUGLR047 and SUGLR545. These functionalities include the following:

1. **Right Click Option**
   
   Right click on the Related Content table or pivot output of SUGLR047 or SUGLR545 and you will have all the query features available to you, such as Filter, Sort, Auto-Size Column Width, Grand Total etc.

2. **View Data Layout Feature**
   
   Once you’ve got the related content output at SUGLR047 or SUGLR545, select a format (table or pivot) and navigate to View > Data Layout.
   - To move items from row to column or from column to row, simply drag and drop.
   - To move items up or down the row of column drag and drop to where you would like the item to appear.
   - To delete items, right click on the item and select “Delete.”
   - To add an item, simply extend the “Catalog List” by clicking on the ‘+’ symbol. Drag and drop the item that you want from the Catalog List to the column or row in which you want it to appear.
Figure 1: Table Format

Drag and drop where you want.

Right click and select “Delete”

Figure 2: Pivot Format
Preview – Workforce Planning

The Budgeting and BI team are currently working with Economics and Business on a pilot of a Workforce Planning model.

This model in Hyperion Planning will assist you in deriving your salary forecasts and budgets by building it up from employee/position detail derived from HR/T2 data. Salary projections will be pre-populated based on current T2 data to minimise the time taken to create the budget/forecast.

More information on this development project will be provided in the next newsletter.

Meet the Budget and Business Intelligence Team

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Director - Budget & Business Intelligence

Steven Chung
Management Accountant
Planning Systems & Reporting

Dr. Monica Chin
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Vicki Hatt
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Resources

Training

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