

# Oracle Hyperion Public Sector Planning and Budgeting Modification Packages

## GET MORE ROI OUT OF YOUR HYPERION PSPB INVESTMENT

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Clarity Partners has developed and packaged a series of enhancement modifications that will enable your institution to gain greater value from your Hyperion Public Sector Planning and Budgeting application.

Our enhancements are designed to improve system design, fix system deficiencies, and enhance system performance. Whether you apply all the enhancements or just one, you will be increasing the utility and ROI of PSPB as well as drastically improving user experience and budget productivity.

## JOB CODE AND UNION CODE CONNECTION

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Traditionally, Hyperion Public Sector Planning and Budgeting (PSPB) utilizes property fields that allow budget users to add additional information to a budgeted position or employee, such as selecting or modifying a Job Code, Union Code, etc. While all of these fields are set up to act independently of the others and have no delivered relationship, organizations sometimes require a relationship between position and employee properties.

Our Hyperion PSPB modification creates a contextual linkage between the Job Code and the Union Code by way of a preexisting relationship. Once a Job Code is selected by the budget user, the Union Code automatically updates to match that change. The contextual link can also extend to include other property fields if required. This modification eliminates errors during budget inputs and ensures improved accuracy in the reporting process.

## FINANCIAL FTE ALLOCATION

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Hyperion PSPB allows users to budget positions and employees by FTE and salary by period (HR View) while supporting the allocation of salary and wage budget totals into multiple cost centers, funds, or departments. This gives a budget office the option to generate a financial view of the budget by position and employee. However, the standard PSPB app does not provide an allocated financial view of the FTE.

Our Financial FTE Allocation modification implements a process that allocates FTE totals by cost center, fund, project, program, or department






in the same manner that the dollars are allocated. This allows budgeted, allocated financial FTEs to be pushed directly to line item Budget Cubes and ASO cubes. In the ASO cubes, reporting views can be created that will present both Human Resources department FTE views by position and employee and financial department FTE views by position and employee. When budgeted allocations are used in PSPB, this modification will significantly reduce the amount of manual effort required to convert the PSPB FTE data to a post-allocated financial FTE.

## CUSTOM DECISION PAKS

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Oracle will not be supporting the current architecture used for Decision Paks in combination with Hyperion PSPB. However, we have developed an alternative to the delivered Decision Pak process. These custom Decision Paks will run significantly faster while maintaining all of the budgeting benefits of the delivered type.

Our Decision Pak methodology addresses several functionality deficiencies of Oracle's out-of-the-box version. This modification:

-  **Allows** for persistent naming of budget requests across all reporting points (Hyperion Financial Reports, Planning query forms, Smartview)
-  **Creates** multiple Decision Packages within a single planning unit
-  **Shares** budget requests across multiple Decision Packages
-  **Allows** for immediate visualization and reporting on updates to Budget Requests including/excluding status
-  **Provides** easy scenario analysis of impact-to-bottom line reporting based on Budget Request rankings.

In addition, application navigation is simplified, and workflow approvals can be tied to Entity/Budget Request combinations.

## MASS APPROVALS

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The approvals process that comes with the current standard Hyperion PSPB application forces users into a model that requires individual approval for each change that affects a position's major properties. Each change to an FTE by position/employee, for example, must be individually approved for position and/or employee. The process is cumbersome, time-consuming and, depending on your organizations budget process, at times completely unnecessary. Oracle currently provides no option in which to turn off or ignore the process.

As a result of client demands, we have developed a modification that will allow users to bypass this tedious, one-by-one approval process. As an alternative, the update allows for a mass approval process for all positions and employees by one or more departments. This modification significantly reduces the amount of time spent on position budgeting, leading to increased user acceptance and enhanced user experience.



## BUDGET EXCLUDE UPDATE

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The Exclude from Budget process was created to work as an effective tool in Hyperion PSPB. The goal was to allow budget users to quickly remove a position from the department budget totals while maintaining a nice audit trail in the budget record. However, the delivered Budget Exclude business rule has quirks that render it unreliable and ineffective in this process.

Our modification to the Exclude from Budget rule ensures this process has a highly effective and reliable result by ensuring the position record that is excluded from budget not only shows the correct status, but the position budget amounts. The FTEs are excluded from the department and organization department budget totals. Modifying the Budget Exclude capability in this way reduces the amount of time and effort of budget users and enhances user experience within the system.



## MASS TRANSFERS – INCLUDING POSITION AND EMPLOYEES

In Hyperion PSPB, Transfers are an effective way to move positions and employees from one department to another. The out-of-the-box method of Transfers requires that each position be addressed individually.

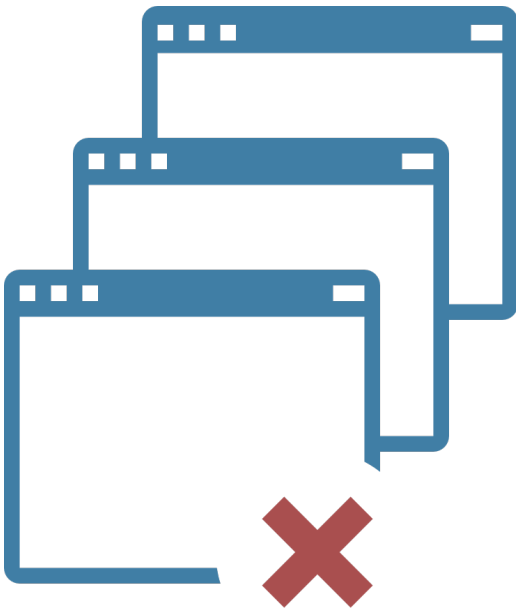
When using the position and employee type app in Hyperion PSPB, a user has to complete multiple steps to accomplish just one position transfer – the employee must be removed from the position, which is then transferred to another department. Then the fill position process has to run to move the employee back into the position in the new department.

This is a very time-consuming process even when only a few transfers occur in the budget, so when departments need to be completely reorganized

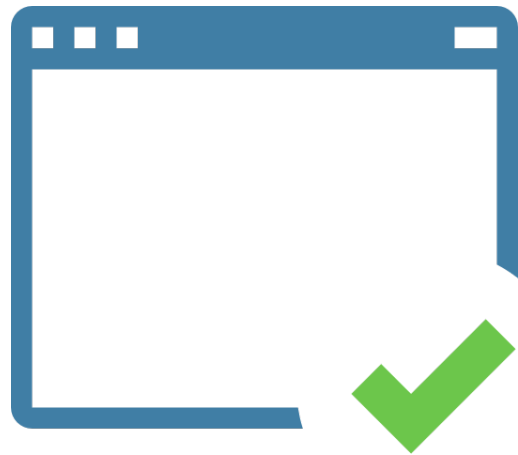
during the budget process, this functionality is useless.

Our Mass Transfers modification is written to address the cumbersome nature of that current process. It functions like this: The customization allows the budget office to do mass transfers of positions and employees by selecting multiple positions or entire departments with all relevant positions and employees then executing those transfers to the new target department.

Our customization also eliminates the need to have multiple steps when transferring a filled position. The customization streamlines the Transfer process and significantly reduces the time commitment necessary to execute multiple transfers during the annual Budget process.



**The Delivered Method**



**Our Modification**



## MODIFIED ADJUST FTE PROCESS

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In Hyperion Public Sector Planning and Budgeting users have the ability to increase or decrease the FTE assigned to each position or employee. This Adjust FTE business rule has been problematic in several releases of PSPB. This FTE process has to coordinate with the approval process and increases or reductions in the FTE can be particularly problematic sometimes turning approved FTE's negative.

Our calculation logic has been modified to test for valid FTE values and will reject inputs that result in non-sensical results. In addition, the period spread of FTE by status type (Existing, Proposed, Approved, Unapproved, etc) calculation logic has been modified to correctly bucket the FTE values and validate against the requested FTE assignment value.

Clarity Partners is currently in the process of adding even more effective enhancements to Hyperion PSPB. We also do custom modifications upon request - contact us today to learn more.

## CONTACT

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