Hyperion Budget Planning & Development System

Budget Variance Reporting - In Workspace
August/September, 2012

Hyperion Training Sessions

» Introduction and Overview
» Navigation
» Budget Maintenance System
» Budget Management – Forecast Tool
» Budget Variance Reporting
  › In Workspace
  › In Data Warehouse (Cognos)

Learning Objectives

» Overview the various reporting tools
» Discuss the budget variance reports in Hyperion Workspace
» Demonstrate how to run reports
» Discuss examples of how different reports can be used

Reporting Tools Summary

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<tr>
<th>System</th>
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<th>Type/Use</th>
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<td>Budget Development Reports</td>
<td>Management</td>
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<td>Budget Management Reports</td>
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<td>Smart View</td>
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<td>Web Apps</td>
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<td>Grants, construction, department projects</td>
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Hyperion Workspace Reporting – New Features

» For all FY budget variance reporting after 7/1/12
  › Replaces Web Apps budget variance reports
» Uses Hyperion system and accounts
  › More robust system for large reports
  › Expanded search options
  › Different combinations of data
  › Reports include budget and actual data
» Security needed for Hyperion

Hyperion Homepage
Hyperion Budget Management Reports

» 1 – Budget vs. YTD Actual and Forecast
» 3 – Budget to Actual Report 3 prior years plus YTD and Variance
» 4 – Prior 3 Yr and Current Actuals vs Current Year Budget
» 5 – Budget & Actual & Variance for Total and YTD – Current plus 3 Prior Yrs

Hyperion Report Features

» Prompts used to select entities
» Arrows allow user to view details
  › Line item – ChartField
  › Column – Break out totals
» Within the Reports:
  › Page options (entities)
  › Point of View
» Print report as PDF

Hyperion Report BudVar 1 - Prompts

Hyperion Report BudVar 1 – POV and Page
**Hyperion Report BudVar 4 – No Prompt**

**Strengths of Hyperion Reports**
- Very fast
- Separate reports produced if chose multiple entities or programs
- Better search selection (e.g., uses wildcards, can search node name)
- Smartview add-on to Excel
- Can change inputs (POV) to re-run report

**Strengths of DW/Cognos Reports**
- More accounting data in DW (e.g., drill-down to journal, BudVar1a included encumbrances)
- BudVar2 unique to DW produces a report for every program within a DeptID/node
- Can aggregate data in single report
- Input screen standardized across reports

**References**
- [https://doit.missouri.edu/training/hyperion/hyperion.html](https://doit.missouri.edu/training/hyperion/hyperion.html)
- Online UPK tutorial
- Training guides
- IT – Help Desk
- [http://doit.missouri.edu/help/](http://doit.missouri.edu/help/)
- 573.882.5000

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