ORACLE HYPERION PLANNING:
STRATEGIC BUDGETING FOR HIGHER EDUCATION

Oracle Hyperion Planning is a web-based budgeting application that enables colleges and universities to plan, manage and control all of their financial resources in a single software application. Strategic planning and academic initiatives can be implemented at the top of the organization, while the annual budget and long-range financial plans are developed, analyzed, and monitored at a detailed departmental or school level. Using real-time workflow for automated budget roll-ups and on-line task-list approvals, Oracle Hyperion Planning is designed to reconcile the top-down goals of the board, president, academic leadership and business officers with the bottoms-up budget development process that spans an entire campus or multiple campuses.

Distributive Budgeting and Centralized Financial Analysis
With Oracle Hyperion Planning the university budget office is able to support a comprehensive budget process that brings all sources and uses of funds into the planning process. By creating simple and easy-to-use web forms that capture both numeric data and detailed funding justification requests, the budget can be developed in a timely and highly accurate manner. All information that impacts the budget is captured in a centralized multidimensional database with a powerful calculation engine that can be used to conduct an unlimited number of what-if scenarios to quickly and easily answer complex budgeting questions during the decision-making process. Multiple versions of the budget can be stored, documented and tracked during the time-sensitive recommendation, approval, and adoption phases of the budget cycle. Reporting capabilities give users the ability to access information through a variety of report-building options and easily publishes reports to the web or to highly formatted, publicly available budget documents. The end result is a high-participation budget process that is driven by goals and objectives that are judged on the efficiency and effectiveness of teaching, learning, research and mission-based services.

Ensure Data Quality for a Highly Effective Budget Process
At most colleges and universities, planning cycles are long and tedious. Data sources may be dispersed across various IT systems located in different departments and programs, making information gathering difficult and frustrating. There are often major disconnects between funding authorities, governing boards, and “on-the-ground” administrators, faculty, and researchers. The process doesn’t tap the front-line stakeholder knowledge that provides the most accurate view of institutional realities. Demands on time and resources are so severe that only minimal effort can be devoted to thoughtful analysis of the budget and long-range financial planning. With so much effort spent on process and so little spent on analysis, it’s difficult to keep pace with rapidly changing political and economic situations, variable revenue streams, and fluctuating costs. Institutions can come under brutal scrutiny from policy-makers and the general public if they are unable to react rapidly to changing conditions and plan for likely outcomes. Despite an awareness of the significant adverse impacts of isolated data and disconnected processes, the most common solution for university budgeting and planning is still the disconnected spreadsheet that makes the planning process time consuming, inefficient and unreliable. The resulting long budget cycles, discrepancies and
inaccuracies limit responsiveness to change. Oracle Hyperion Planning allows you to rationalize the existing spreadsheet environment in a single planning system, allowing everyone associated with the budget process to focus on value-added activities that support better decision-making.

**Ensure Accurate Forecasts with Integrated Analytic Capabilities**

Accurately predicting tuition revenues, endowment earnings, and auxiliary business unit income is a daunting challenge facing all colleges and universities today. Equally challenging is anticipating how faculty salary demands, rising energy costs, and ever increasing demands for better student services will impact expenditure projects. Oracle Hyperion Planning allows business users to perform sophisticated analyses of key business operations and use that information to create accurate forecasts and long-range plans. Using a single interface, you can access user-friendly dashboards, interactive analytics, and richly formatted financial reports while interacting with the planning system. With the Enterprise Performance Management Architect feature, you can easily create, manage, and integrate your planning processes for faster deployment and lower cost of ownership.

The intuitive Web interface of Oracle Hyperion Planning allows academic and financial business users to quickly update key business drivers and see their related impact on financials.

**Expand Beyond Annual Operating Planning**

Oracle Hyperion Planning helps you synchronize the annual operating budget process with other multiyear planning processes. With different start and end dates and revenue streams that span multiple fiscal years, grants are often budgeted separately from the annual budget. Alumni development and endowment earnings are difficult to predict, and despite their importance to the financial health of a university, they are often keep separate from the planning process. Oracle Hyperion Planning provides the flexibility to accommodate these unique planning processes while integrating them into the overall planning process. With this comprehensive information, you can make better decisions about what funding to pursue and can ensure you pursue it more effectively. Oracle Hyperion Planning can plan for capital campaigns that can be evaluated in context to the overall financial position of the university, as well as helping you measure against peer institutions.
**Leverage Existing User Competencies with Microsoft Office Integration**

Oracle Hyperion Planning allows you to update and report plans using familiar tools such as Microsoft Office Excel, PowerPoint, and Word. Through Excel, for example, you can easily perform sophisticated financial modeling and reporting using reliable and up-to-date information from the central planning database. Oracle Hyperion Planning lets you take your plans offline and, at your own convenience, change assumptions, perform calculations, analyze results, and connect back to the central database to synchronize your updates.

Additionally, you can directly integrate data from the planning database into PowerPoint and Word. This allows you to quickly create highly customized reports with accurate information and to automatically refresh the report when the underlying data change. The end result: reduced manual intervention, improved data integrity, and increased reporting accuracy.

**The built-in Microsoft Office integration in Oracle Hyperion Planning allows users to update and report plans in Excel, PowerPoint, and Word.**

**Connect a Wide User Community with Simplified Web Interface**

Oracle Hyperion Planning enables your business users to easily view plans and reports regardless of their computer skills. It also guides your less-frequent users step by step through the planning process using a wizard called Task Lists, allowing you to reduce cycle times while ensuring that your plans are complete and reliable. With Oracle Hyperion Planning’s secure Web infrastructure and user-friendly interface, you can even include your external business partners, such as suppliers or distributors, in your planning process. As a result, you will be able to increase the timeliness and accuracy of your forecasts.

**Enable Quick Implementations through Predefined Solutions**

The Oracle Hyperion Planning platform allows you to easily add predefined modules for workforce planning and capital asset planning, thereby reducing implementation time and cost while providing best-practice functionality.

- Oracle Hyperion Workforce Planning lets you quickly and efficiently plan for head count, salary, and compensation across the university. By automatically connecting with your workforce data, it helps you assess the business impact of your workforce decisions in real time.
• Oracle Hyperion Capital Asset Planning allows you to plan existing and new capital assets, maintenance, transfers, and depreciation while analyzing their impact on income, balance sheet, and cash flow.

Ease Collaboration and Maintain Control with Powerful Workflow
Oracle Hyperion Planning’s powerful workflow functionality—including e-mail notifications, alerts, and task lists—empowers users to track and communicate the progress of plans and budgets. In addition to creating, validating, and changing plans and task lists, you can also identify bottlenecks and conduct what-if analyses and scenario testing.

Support Large Deployment with Scalable Architecture
Oracle Hyperion Planning is built on a scalable architecture, which allows you to start with an initially small deployment before rolling it out to hundreds or thousands of required users in the organization. The architecture allows for flexible data entry, analysis, and frequent real-time updates from anywhere, in a safe and secure environment using a standard Web browser.
Moreover, Oracle Hyperion Planning provides collaborative planning processes and dependable, centralized data management, significantly reducing your maintenance and distribution costs. Oracle Hyperion Planning interoperates with existing security mechanisms to help ensure maintenance and security consistency.

Ensure Data Quality with Robust Data Integration
Oracle Hyperion Planning facilitates bidirectional information exchange with legacy applications, data warehouses, and enterprise resource planning and transaction systems. It is an open and extensible system that leverages data that was previously “locked” in silos and other systems.

Contact Us
For more information about Oracle Hyperion Planning, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.