

Hyperion Training

What is it?

Hyperion is a user friendly planning and budgeting tool that organizes Banner data. Users can utilize Hyperion for reporting and ad-hoc analysis seamlessly.

Why did we buy it?

To move away from budgeting through email and excel

Hyperion enables users to send funding requests to be approved (or denied) to appropriate people

Who will use it?

Anyone that accesses Banner Finance data

Where can you use it?

Everywhere! Hyperion is cloud-based, so as long as you have an Internet connection the system can be accessed anywhere

Details...

- Two parts:
 - Planning- the “fancy” reports, customizable, but require development
 - Smart View- Excel add-in used for ad-hoc analysis. This is quick and instantaneous
- Data uploads weekly from Banner (Friday evenings)
- Account and Org structure follows Banner

Fields

1. **Years**- this is the **fiscal** year. Hyperion currently has historical fiscal years 2013, 2014.
2. **Scenario**- these fields are permanent budget, current budget, actuals, encumbrances, and adopted budget
3. **Version**- this is a system attribute. For the time being, we will only be using “Working”
4. **University**- this is the organization structure which matches Banner
5. **Measures**- data will be pulled in one of three ways based on your selection: Year to Date (YTD), Quarter to Date(QTD), or Month to Date (MTD)
6. **Fund Type**-like Banner, indexes have a specific fund type, which is reflected here
7. **Program**- like Banner, indexes have a specific program type, which is reflected here
8. **Account**- like Banner, data is booked to specific accounts. This is reflected here
9. **Period**- this is the **fiscal** month of activity