



Hyperion Public Sector Planning and Budgeting

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a list of beginner's guide and FAQs for Oracle Hyperion Product Suite. Download many such learning documents, student guide, Lab Guide and Hands-on practice materials. This document describes an introduction to Oracle Hyperion Public Sector Planning and Budgeting and How to Create Application. **Join our professional training to learn from Experts.**

History:

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Public Sector Planning and Budgeting:

Oracle Hyperion Public Sector Planning and Budgeting is a web-based integrated budgeting and planning solution in the EPM system suite. It helps public sector organizations manage existing and projected budgets that are based on reliable information for Human Resource (HR) and General Ledger (GL) systems.

- PSPB supports integration with external systems with the help of ERP Integrator.
- PSPB supports allocation of salary and position budgets into the appropriate ledger accounts.
- Public sector budgeting activities are tightly integrated with core financial and operational systems.

Public sector budgeting activities are tightly integrated with core financial and operational systems. You can perform the following tasks:

- Allocate salary and position budgets to the appropriate ledger accounts.
- See the impact of detailed salary plans on the overall operating expense budget.
- Define decision packages and budget requests.
- Load the PSPB data by using ERP Integrator.
- Write the revised budget back to the GL .
- Publish books for offline approval and statutory reporting purposes.

Application Creation Process in Public Sector Planning and Budgeting:

Create Data Source:

Logon to Hyperion Application creation Wizard

(<http://<Server IP>:<Hyperion Planning Port>/HyperionPlanning/AppWizard.jsp>)

Log in as administrator.

Click on Manage Data Source.

Click on Create Data Source.

Enter the details in the 'Create Data Source' screen as required in the screenshot below:

Fields displayed with an asterisk (*) are mandatory..

Data Source Name * PSPlan

Data Source Description Public Sector Planning

Application Database

Select Database Platform Oracle

Server localhost

Port 1521

Database ORCL

User system

Password manager

Custom ☐

Connection URL

Validate Database Connection

Essbase Server

Server localhost

User admin

Password admin

Unicode Mode ☐

Validate Essbase Connection

Provide / Input all the values under the Application Database and Essbase Server, then Click on the 'Validate Database Connection' and 'Validate Essbase Connection'. Validation of Application Database / Essbase Server has to be successful before proceeding to the next step. Click on **Finish**.

Creating Public Sector Planning and Budgeting Application:

To create Application, Select the 'Data Source' and click on '**Create Application**' in '**Hyperion Application Creation Wizard**'.

ORACLE Hyperion Planning

Create Data Source Edit Data Source Delete Data Source

Data Source Name	Application Name	Application Description
<input type="checkbox"/> BSPApp1	BSPApp1	
<input type="checkbox"/> PSPlan	PSP	Public Sector Planning

To create a data source, click Create Data Source.
To edit a data source, select a data source and click Edit Data Source.
To delete data sources, select data sources that are not associated with an application and click Delete Data Source.

Cancel Create Application

Input the Application information in the 'Select' tab as shown below :

Select the data source and application properties

Data Source	PSPlan
Application	PSP
Description	Public Sector Planning
Shared Services Project	Default Application Group
Instance	PLANNING_LWA
Application Type	Public Sector Planning and Budgeting
Calculation Module	Calculation Manager

Select the data source to use for storing application information. Enter an application name of up to eight characters that is not the same as an existing Analytic Services application, and enter a description. Select the Shared Services Project and an instance for the application. The application will be created on the server to which you're currently connected.

Note : Select Application Type as 'Public Sector Planning and Budgeting'
Press 'Next' to move onto the next tab.

ORACLE Hyperion Planning

Select Calendar Currencies Plan Types Finish

Define the application calendar

Base Time Period <input checked="" type="radio"/> 12 Months <input type="radio"/> Quarters <input type="radio"/> Custom Custom Prefix TP Periods per Year 13	First Fiscal Year 2008 Number of Fiscal Years 6 Fiscal Year First Month January Fiscal Year Start Date Same Calendar Year Weekly Distribution Even Distribution
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Calendar settings determine the base time period and span of time for all scenarios of data in the application. A unique prefix and the number of time periods set the application's calendar to suit specific business needs. For monthly time periods, set how weeks are distributed in the months that make up a quarter. Specify the start year and month, and list the number of years to include in the application. The fewer base time periods you establish, the more years you can include, not to exceed 100 years.

Define Year and Period Dimension

Under the 'Calendar' tab, make the following selections:

Base Time Period: 12 Months

(Note: PSPB supports only month-based calendars, so don't select Quarters/ Custom)

First Fiscal Year : < Set this value equal to the earliest year for which you will have historical data in the application>

Number of Fiscal Years : <Total no. of years for the application>

Fiscal year First Month : <Select the starting month of the year as per requirement>

Weekly Distribution: Even Distribution

Press '**Next**' to move to the next tab.

ORACLE Hyperion Planning

Select Calendar **Currencies** Plan Types Finish

Set currency options

Default Application Currency: USD \$ United States of America dollar

Will your application support multiple currencies?

☒ Yes
☐ No

Selecting the default application currency adds the Currency dimension member to the application, and sets the default currency for the Entity dimension member. If the application will support multiple currencies at any time in the future, select Yes for multiple currencies now. Select Administration and then Manage Exchange Rates to define exchange rates.

Define Currencies

Make the following selection in the '**Currencies**' tab.

Default Application Currency : <as applicable>

Support Multiple Currencies: Yes / No <as per requirement>

Press '**Next**' to move to the next tab.

ORACLE Hyperion Planning

Select Calendar Currencies **Plan Types** Finish

Choose and name the plan types

Standard Plan Types

	Name
<input checked="" type="checkbox"/> Plan Type 1	EmpTrng
<input checked="" type="checkbox"/> Plan Type 2	CompPlng
<input checked="" type="checkbox"/> Plan Type 3	TntPlng

Public Sector Planning and Budgeting Modules

	Name	Configuration Options
<input checked="" type="checkbox"/> Human Capital Planning	HCP	Position and Employee

Each application requires at least one plan type. In addition to any modules you are licensed for, you can create up to three additional plan types, and then customize them by adding dimensions and members. It's a good idea to plan ahead for the type and number of plans the application will need.

Define Plan Type

In '**Plan Types**' tab of the screen, select Plan 1, Plan 2 and Plan 3 and can name them as per the requirement.

Select PSPB module '**Human Capital Planning**' checkbox. Under Configuration Options drop-down list, select either of the 'Position and Employee' / 'Position' / 'Employee' as per the requirement.

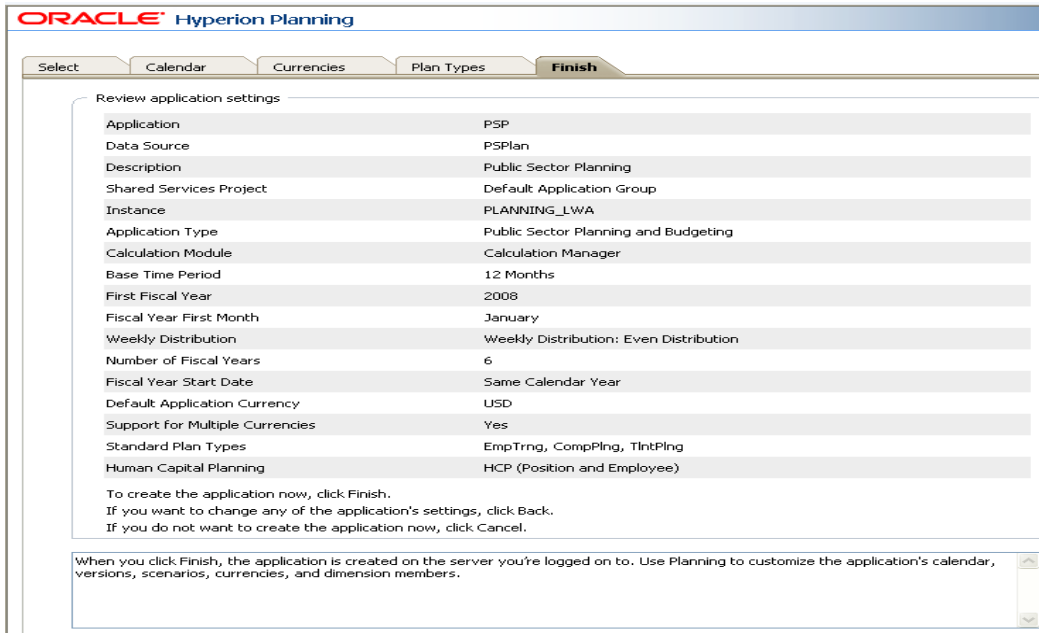
Position and Employee: Enables to plan and track expenses by position and by employee.

Position: Enables to track expenses by positions, not by employees.

Employee: Enables to track expenses by employee, based on actual employee salaries.

Press '**Next**' to move to the next tab.

In the last tab (**Finish** tab), verify the summary details and click **Finish**

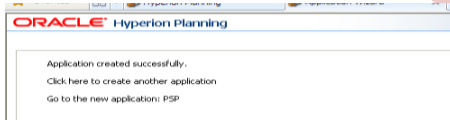


The screenshot shows the 'Finish' tab of the Oracle Hyperion Planning application. The 'Review application settings' section contains the following details:

Application	PSP
Data Source	PSPlan
Description	Public Sector Planning
Shared Services Project	Default Application Group
Instance	PLANNING_LWA
Application Type	Public Sector Planning and Budgeting
Calculation Module	Calculation Manager
Base Time Period	12 Months
First Fiscal Year	2008
Fiscal Year First Month	January
Weekly Distribution	Weekly Distribution: Even Distribution
Number of Fiscal Years	6
Fiscal Year Start Date	Same Calendar Year
Default Application Currency	USD
Support for Multiple Currencies	Yes
Standard Plan Types	EmpTrng, CompPlng, TintPlng
Human Capital Planning	HCP (Position and Employee)

Below the table, there are instructions: "To create the application now, click Finish. If you want to change any of the application's settings, click Back. If you do not want to create the application now, click Cancel." At the bottom, a message states: "When you click Finish, the application is created on the server you're logged on to. Use Planning to customize the application's calendar, versions, scenarios, currencies, and dimension members."

A message will appear informing about the successful creation of application.

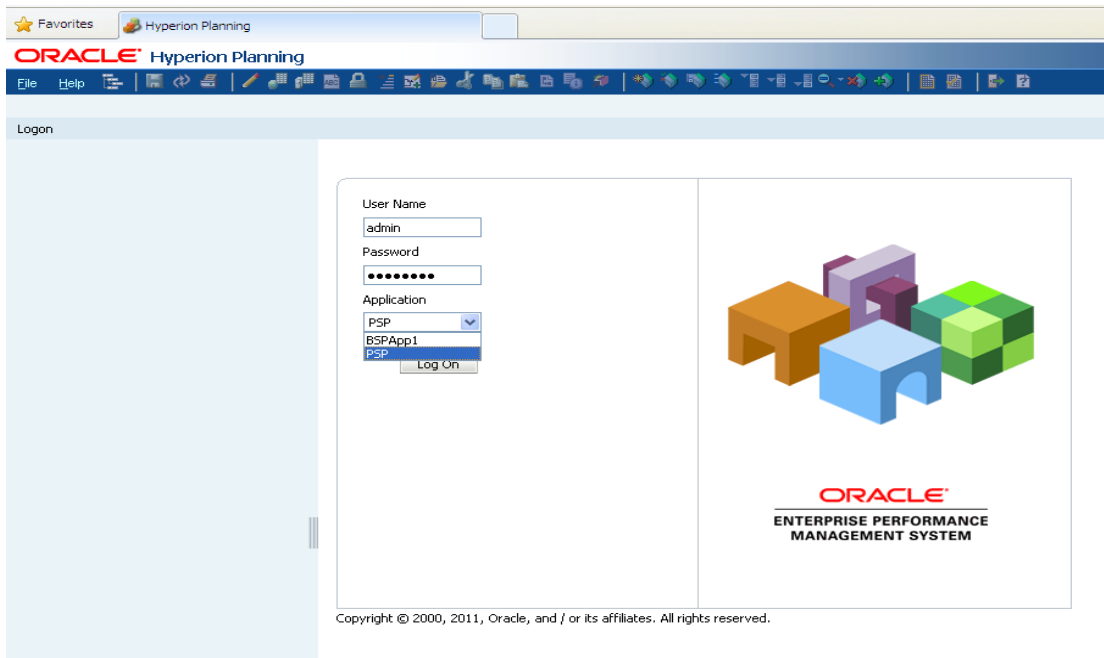


The screenshot shows a success message in the Oracle Hyperion Planning interface. The message reads: "Application created successfully. Click here to create another application. Go to the new application: PSP".

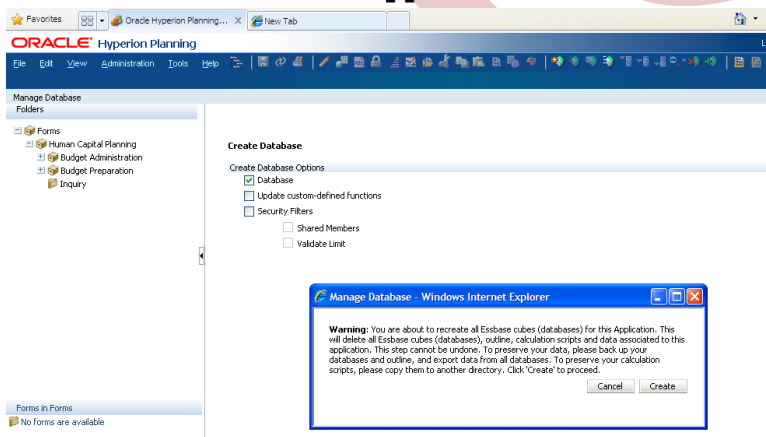
Click on **Log off**.

Creation of Essbase Database:

Login to PSPB application using the admin credentials.
Select 'PSP' from the Application Drop-down.

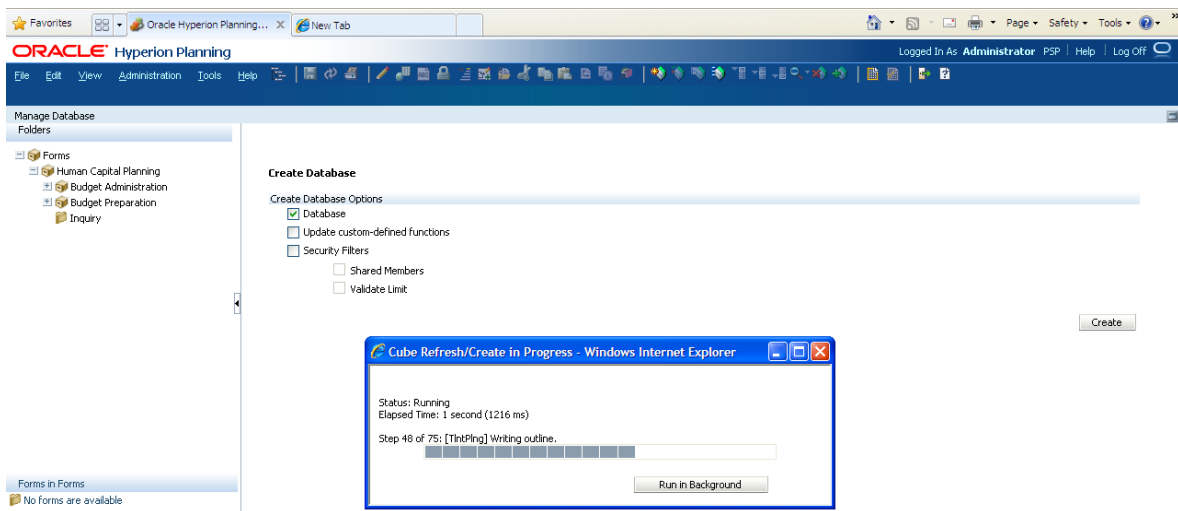


Go to Administration > Application > Create Database

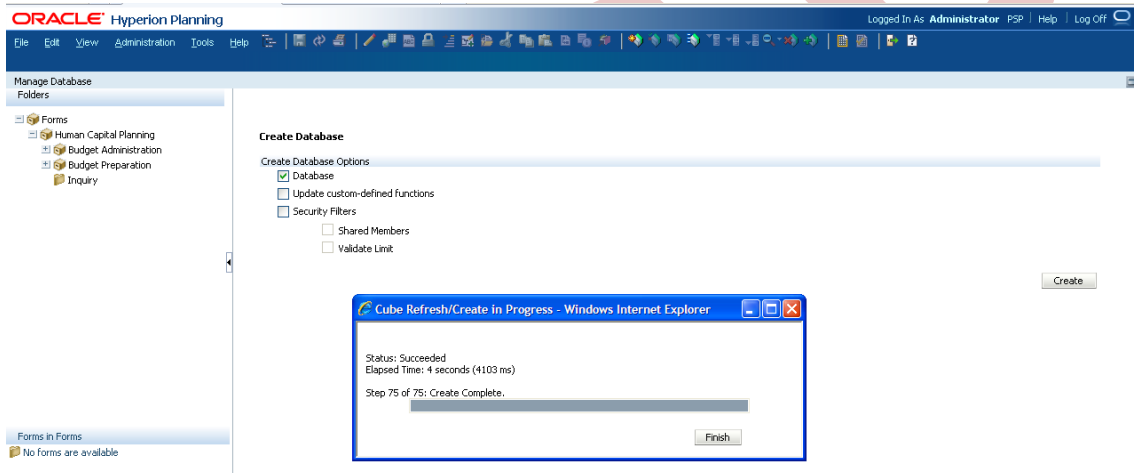


Select Database checkbox, then Click Create.

Below pop-up window “the Cube Refresh/Create in Progress” show the status of the cube’s being created in the Essbase Database.

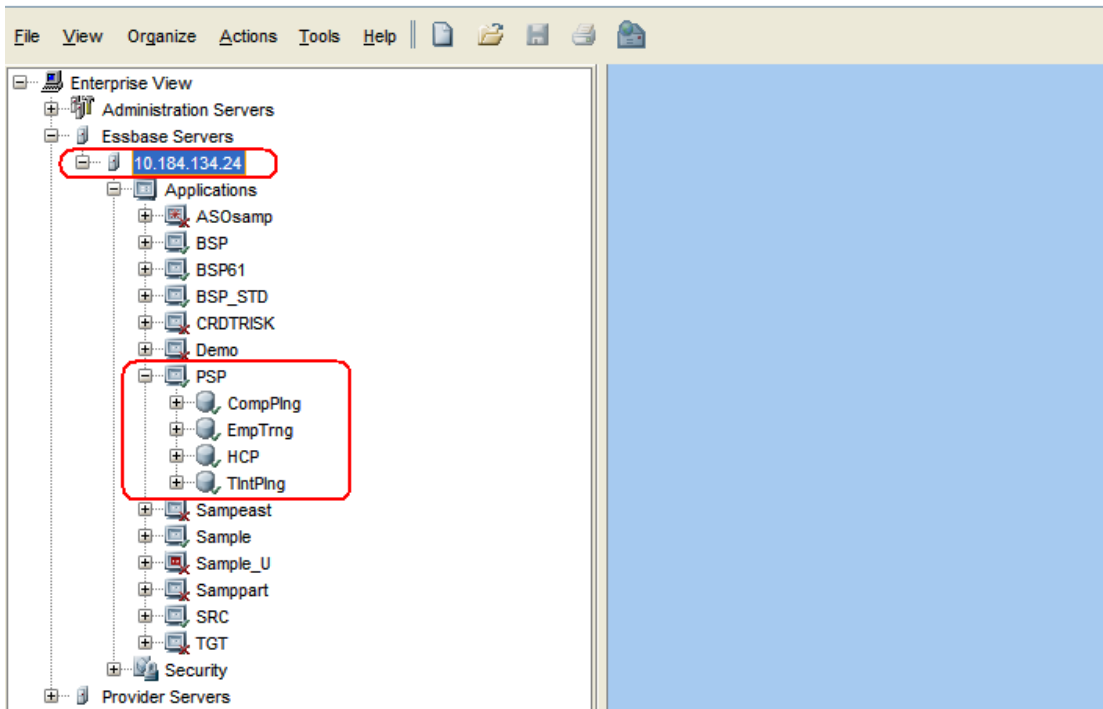


Upon Successful completion, the cubes are now created in the Essbase database.

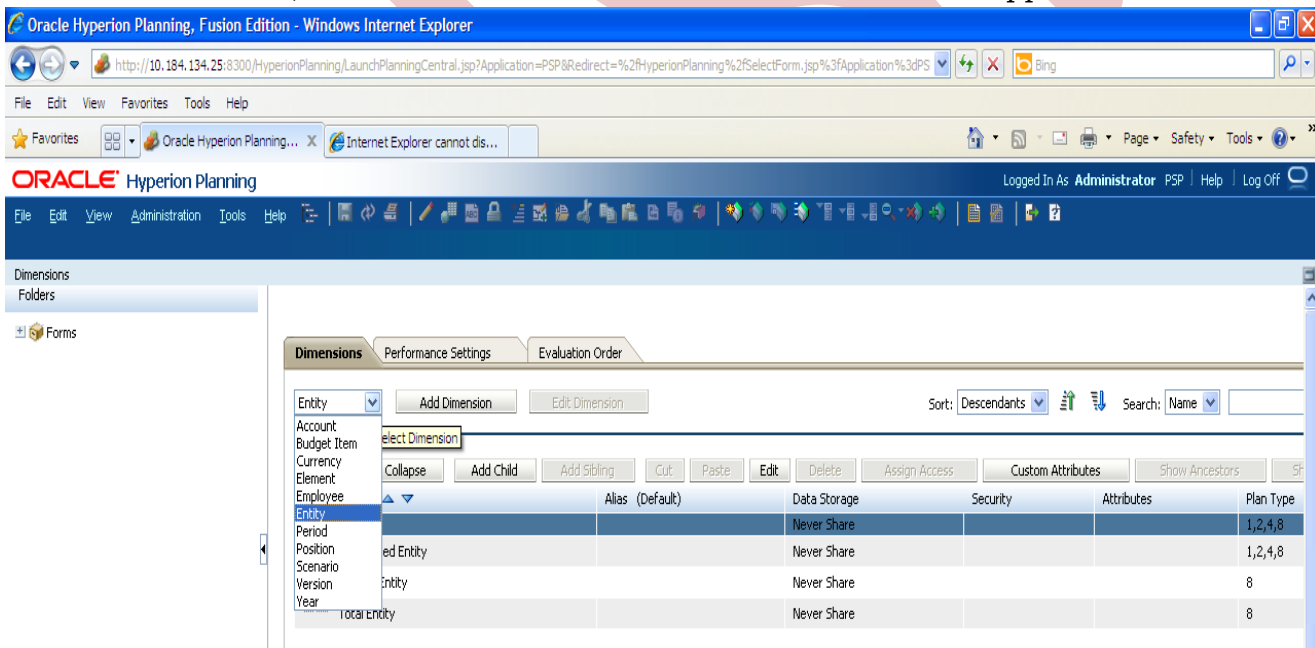


We can see the below cubes being created in the Hyperion Essbase Created, which were created through Hyperion Planning for Public Sector Planning and Budgeting application.

ORACLE® Essbase Administration Services



As we can see below, the list of the dimensions created for the PSPB Application.



Note:

- 1) By Default, the Scenario, Version, Period, Year, Currency, Account, Entity and Request dimensions are enabled for all plan types.
- 2) The Position, Employee, Job Code, Budget Item, and Element dimension are enabled for the HCP plan Type.

Prebuilt Dimensions

Dimension & Members :

Account Dimension: System Members, Human Capital Planning Accounts, Revision Properties, Segment Information, and Segment Descriptions.

Budget Item: Status Assignments, Element Changes, and Allocation Assignments.

Currency: Local members and default currency member.

Element: Total Compensation Expenses Members, Unspecified Element, Salary Grade Defaults, Benefit Defaults, Additional Earnings Defaults, and Employer-paid Tax Defaults.

Entity: Unspecified Entity, Generic Entity, and Total Entity.

Period: Parent Member --> YearTotal and its descendants. Member --> BegBalance.

Position: All Positions and its descendants.

Scenario: Budget and Baseline Budget.

Version: Stages and Revisions

Year: All Years parent and its descendant.

Employee: Employees who have a direct employment relationship with employers. (All the employees information)

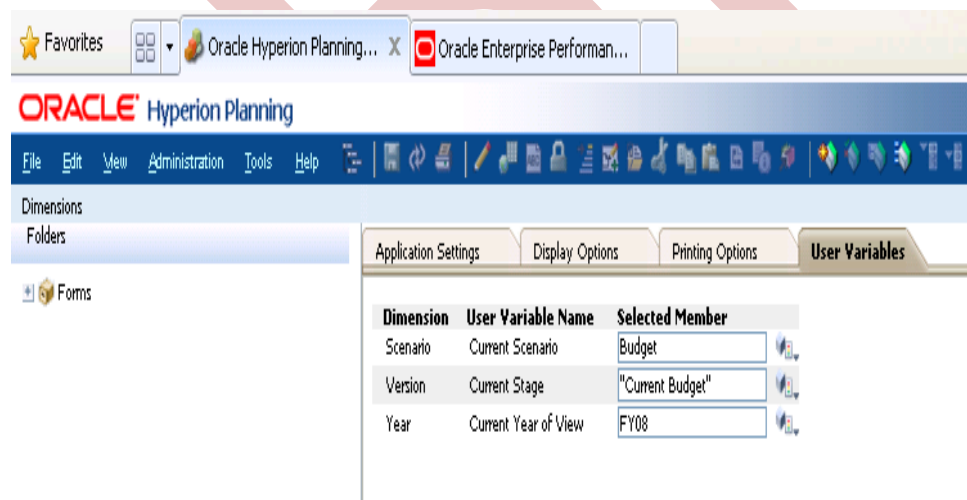
Job Code : Generic employee roles that are independent of organizations.

Note : Do not delete predefined members. You can add dimensions and load members for user-defined dimensions. Once the Planning application is created, a total of 100+ tables are created in the database / schema which start with "HSP_".

Setting Up Values for User Variables :

Once you Login for the first time, you should set values for user variables.

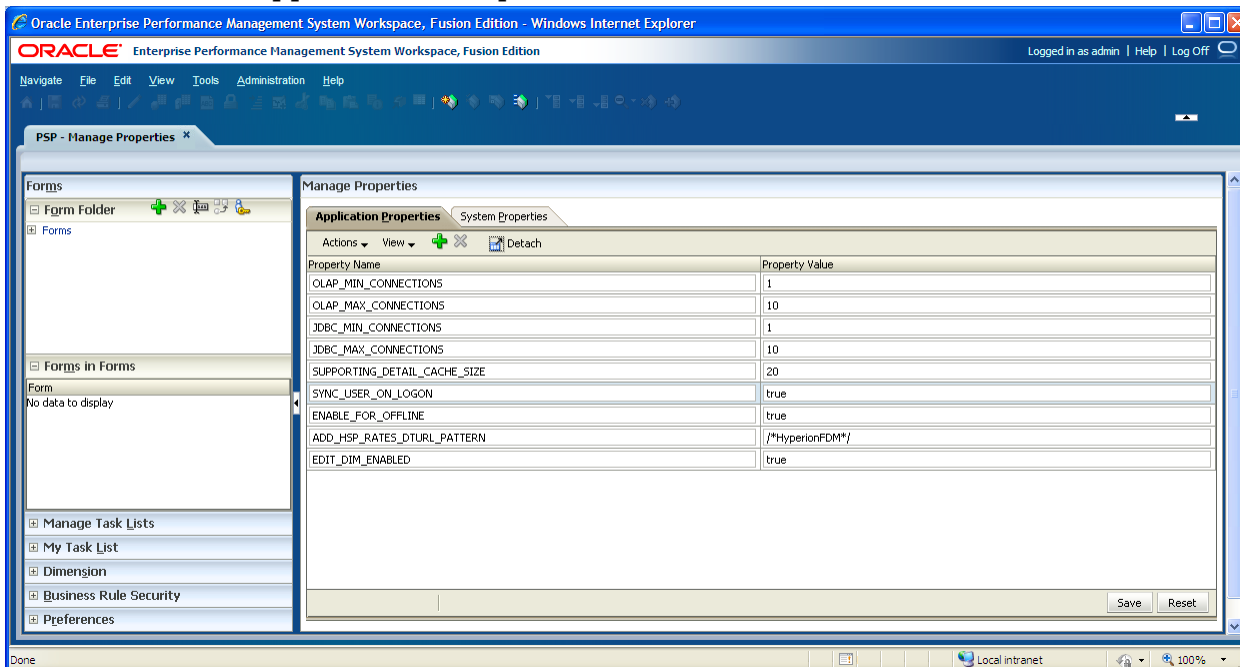
File > Preferences > User Variables.



Select values for the user variables and click **Save**.

Setting Planning properties

Administration > Application > Properties



Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Logged in as admin | Help | Log Off

Navigation: Navigate File Edit View Tools Administration Help

PSP - Manage Properties x

Forms

- Form Folder
 - Forms
- Forms in Forms
 - Form
- Manage Task Lists
- My Task List
- Dimension
- Business Rule Security
- Preferences

Manage Properties

Application Properties System Properties

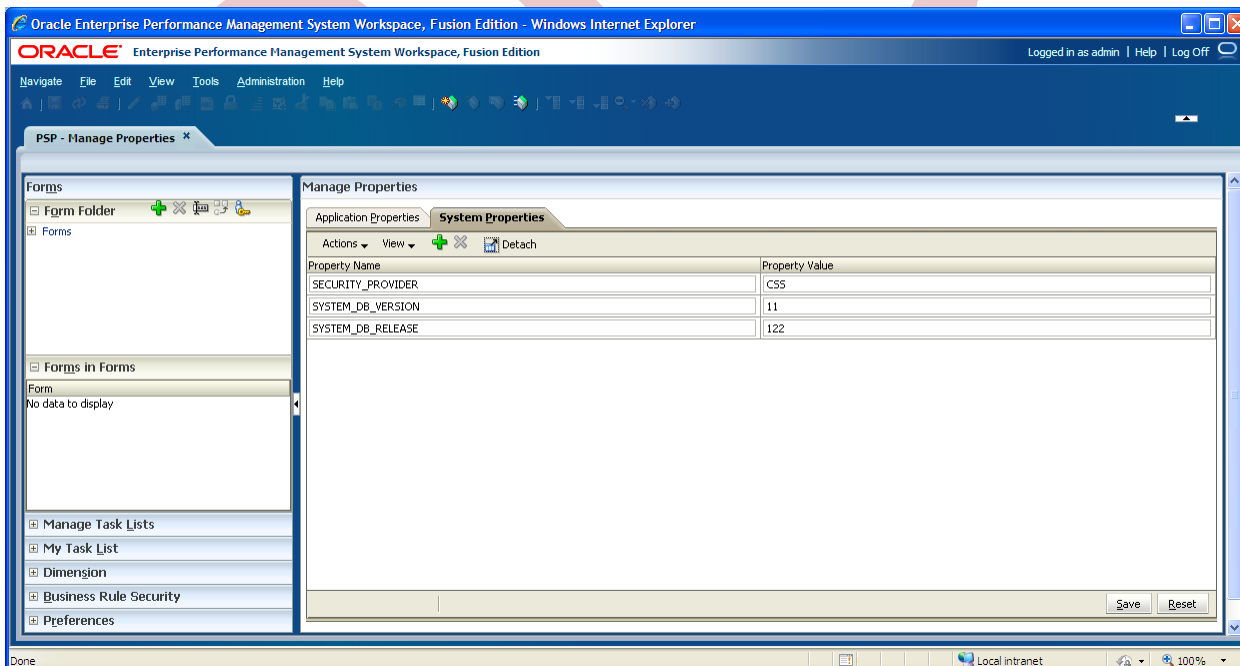
Actions View + Detach

Property Name	Property Value
OLAP_MIN_CONNECTIONS	1
OLAP_MAX_CONNECTIONS	10
JDBC_MIN_CONNECTIONS	1
JDBC_MAX_CONNECTIONS	10
SUPPORTING_DETAIL_CACHE_SIZE	20
SYNC_USER_ON_LOGON	true
ENABLE_FOR_OFFLINE	true
ADD_HSP_RATES_DTURL_PATTERN	/*HyperionFDM*/
EDIT_DIM_ENABLED	true

Save Reset

Application Properties

To set properties for the current Application. You can add or change application or system properties as per the requirement / business needs.



Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Logged in as admin | Help | Log Off

Navigation: Navigate File Edit View Tools Administration Help

PSP - Manage Properties x

Forms

- Form Folder
 - Forms
- Forms in Forms
 - Form
- Manage Task Lists
- My Task List
- Dimension
- Business Rule Security
- Preferences

Manage Properties

Application Properties System Properties

Actions View + Detach

Property Name	Property Value
SECURITY_PROVIDER	CSS
SYSTEM_DB_VERSION	11
SYSTEM_DB_RELEASE	122

Save Reset

System Properties: Setting the properties for all Planning Applications.

Once the changes are made, Click **'Save'**.

Note : For any property changes, make sure to restart the Planning server.

Appendix

Decision Packages & Budget Requests:

During the budget cycle, you can submit requests for additional funding by creating Decision Packages using budget requests. Budget requests are evaluated for proposed projects to identify the impact of these new proposals will have on the existing baseline budget. Once approved, the additional funding requests are included in the overall budget.

Creation of detailed budget books and reports is an important requirement in public sector and higher-education organizations. PSPB enables organizations to use Financial Reporting with public sector-related features to create highly formatted books.

PSPB provides the flexibility to accommodate mid-year adjustments and other changes such as updates from contract negotiations after the budget is approved.

Adhoc revision requests can be made in PSPB applications to identify the adjustments that need to be made.

PSPB applications are Planning applications that have the full features of Planning, plus they have additional content to address the unique requirements of public sector organizations.

You can prepare the compensation budgets in PSPB.

Allocate salary and position budgets into the appropriate ledger accounts.

Allocation Salary Vs. Allocation Position :

Salary and Position allocations are interlinked with each other.

For Example: An Assistant Vice President is promoted from his current position to the Vice President position then naturally the salary component related to the new role will also be allocated accordingly. The salary allocation will be done on the basis of various components depending on the position.

In this case, the newly appointed VP will be eligible for an Additional Insurance Policy for his family members, a company car provided along with driver, and various other compensation benefits are provided. During the allocation of various benefits, we can observe that there is a need arising of this Job position movement, i.e. a new vacancy of a driver is arising (this can be accommodated using the Decision Package) and hence his salary is a new addition in the current budget.

In some situations, salary allocations have to be revised as per the employees compensation during the recruitment. Ex: A new employee (lateral) have to be compensated with the salary almost equivalent given to the next level, as this can be termed as a skill based requirement.

Whereas, in some situations the organizations have to think ahead of the time. Like, creating new positions in the coming year and salary allocation of budget has to be done accordingly with respect to the position. During preparation of the budget, many cases including the above have to be kept in mind as these can lead to a massive difference in the year end budgeting of the organization.

Human Capital Planning (HCP) :

Select PSPB module 'Human Capital Planning' checkbox (After selecting the PSPB Application Plan Types) . Under Configuration Options drop-down list, select either of the 'Position and Employee' / 'Position' / 'Employee' as per the requirement.

Position and Employee: Enables to plan and track expenses by position and by employee.

Position: Enables to track expenses by positions, not by employees.

Employee: Enables to track expenses by employee, based on actual employee salaries.

Business process followed for PSPB is :

- a) Setting up the Compensation Defaults.
- b) Change and calculate compensation data.
- c) Modifying the line item budget data.
- d) Pushing the compensation and line item data
- e) Reviewing and approving the budget
- f) Reviewing budget books
- g) Revising budgets

Integration with Source systems:

You can integrate metadata and data with external systems, and you can integrate Public Sector Planning and Budgeting with reporting applications for reporting and analysis.

You integrate with the source systems in the following ways.

- Loading the following GL data into PSPB by using ERP Integrator.
 - o Revenues
 - o Expenses
- Loading the following HR data into PSPB by using EPR Integrator.
 - o Existing Employees
 - o Existing Positions
 - o Job Codes
 - o Salary elements
 - o Allocations
- Preparing the compensation budget in Public Sector Planning and Budgeting.
- Allocate salary and position budgets into the appropriate ledger accounts.
- To integrate and aggregate position budgets into operating expenses budgets, load data into a reporting application, either an Aggregate Storage Option (ASO) or a Block Storage Option (BSO) in a standard Plan Type.

Data Write Back to Source Systems:

You write back to source system in the following ways :

- To see the impact of detailed salary plans on the overall operating expense budget.
- Uploading the Operational Data back into the GL systems by using ERP Integrator.
- Uploading the corrected budget data (in Smart View) and writing back into the planning application (Essbase cubes).