

Duke University Health Systems Hyperion System 9 Implementation to Hyperion Version 11 Upgrade

Company Background

Duke Medicine conceptually integrates the Duke University Health System, the Duke University School of Medicine, and the Duke University School of Nursing.

It is the combination of research, clinical care, and education that takes place through the efforts of our faculty, staff, students, and trainees at many different sites throughout our region and worldwide.

As a world-class academic and health care system, Duke Medicine strives to transform medicine and health locally and globally through innovative scientific research, rapid translation of breakthrough discoveries, educating future clinical and scientific leaders, advocating and practicing evidence-based medicine to improve community health, and leading efforts to eliminate health inequalities.

DukeHealth.org

Business Challenges

- Budgeting process fairly manual using Pillar & Excel
- Pillar required files to be distributed to users and then re-consolidated by FP&A once complete
- Budgeting process also included calculations and reports done outside of Pillar in Excel
- No real-time consolidated results as had to wait to consolidate all files from Pillar
- Budgeting calculations and Reporting was mainly done via Excel Spreadsheets, ex: FTE calculation.



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Solution

Phase One – Hyperion System 9 Project

- Established Partnership with Analytic Vision to work with DUHS through the project lifecycle
- Implemented Hyperion System version 9.3.1
- Replaced Hyperion Enterprise with Hyperion Financial Management (HFM)
- Replaced Hyperion Pillar with Hyperion Planning
- Upgraded Hyperion Essbase and its related tools (i.e. Reports & Excel Add-In) from version 7 to 9.3.1
- Established Infrastructure and deployment best practices for Shared Services (security) and Foundation Services (Workspace)
- Created 2 Planning applications
 - Labor application created using Workforce Planning and budgets at employee and job code level
 - P&L application to budget non-hospital revenue and non-labor expenses at GL account/cost center level
 - Built process to feed budgeted salary data at GL account level to P&L application to see complete P&L
 - Have 50 Planning users
- Budget input via Planning forms or Excel Budget templates

Phase Two – Upgrade to Hyperion Version 11

- Create a development environment – only had Production environment
- Implement EPMA to manage metadata with HFM & Essbase to save administrative time (only using with HFM in System 9)
- Correct bug in Planning 9.3.1 that did not allow end-users to use commas when inputting text (bug corrected in version 11)

Benefits

- Improve budgeting efficiencies
- Calculations & reports are all done within Planning
- Users have ability to immediately view reports after inputting data
- Users have access via the web & through Excel with Add-In tool
- Budgets and plans integrated with Financial Reporting and consolidations.
- EPMA saves administrative time and reduces potential user error in updating HFM and Essbase account and entity dimensions
- Enhanced administrative capabilities in 11.1.1.2 EPMA from 9.3.1 version
- Planning end-users can use commas when inputting text (unable to do so in 9.3.1)
- We will have a development environment – currently in progress

