UCB is currently on Brio version 8.3 as the primary tool of the campus for reporting and analysis of data in BAIRS (Financial, HRMS, Payroll), and in limited deployment for Admissions data. Hyperion, a market leader in the Business Intelligence space, acquired Brio in 2003, and a year ago released their Hyperion System 9 Business Intelligence and Corporate Performance Management suite integrating products from both companies. Hyperion has repacked the platform with additional functionality and applied an Enablement Fee to System 9.

Hyperion support for Brio version 8.3 is already poor. For instance, IE7 is not officially supported by the Hyperion, and there are no current plans to do so. Mac OS support and support for browsers other than IE are also not available. There is an available upgrade to version 8.5 which does have IE support, but version 8.5 still lacks Mac OS support. Additionally, support for version 8.5 will expire in September 2008, making an upgrade to version 8.5 unattractive. An upgrade to version 9.3 of their System 9 product will extend support to 2011, include Mac OS support, and extend system capabilities to make use more flexible and attractive to a broader campus community. Operating without vendor support would create an unmanageable security risk for the campus, and it also represents a significant risk to providing this critical service to the ~2000 users across the campus.

A new contract has been negotiated and signed with Hyperion that reduced the Enablement Fee to $168,000 (approximately 35% of their initial offer), converts all campus licenses to an easier to administer and more cost-effective CPU-based model, and includes pricing concessions of 40% discount on future System 9 purchases for a period of 3 years across their product suite, with a maintenance rate of 16% of list. This is of great value as we look at OLAP and planning tools.

With this lower cost, upgrading to System 9 easily represents the lowest total cost of ownership of all available options, avoiding a costly and time consuming conversion effort to a separate Business Intelligence product (perhaps a year based on current counts of 2000 users and 150 published reports). In addition, Oracle and Hyperion have recently announced Oracle’s intent to acquire Hyperion in a friendly takeover. Oracle’s quick and apparently powerful integration of Seibel products with PeopleSoft’s products suggests an Oracle strategy in the BI market that would strengthen the value of Hyperion to UCB, if followed for the Hyperion acquisition.

This proposal is a request of $125,000 in temporary funding to partially fund the Hyperion System 9 Enablement Fee. Business and Technology Solutions will cover the remaining $43,000 of the one-time “Enablement fee”, as well as the $16,800 increase in annual maintenance costs.

Funding was requested at VCAC on March 15 and they acknowledged that this is something that UCB must do. VCAC being short of funds, agreed that VC Brostrom and CIO Waggener would front the $125,000 in funds necessary to allow the purchase to move ahead and directed that we request the funds through the upcoming budget cycle.

1. ALIGNMENT WITH IT STRATEGIC PLAN

Critical Issue 2: Student experience, from prospects through alumni

Student experience 3: Students are best served by staff and faculty who have access to student information that is seamlessly integrated and used throughout the campus.
The Hyperion Brio product is a major component of the many campus systems that administrators rely upon when making key decisions (Goal 1), and it provides a key component of a common data architecture (Goal 3). Analysts in the Registrar’s Office currently use the Hyperion Brio product to access the Pilot Student Data Warehouse. Analysts across campus use it to access the Data Warehouse for data on student employees. Finally, University Relations and departmental analysts use it to access Foundation data. With the upgrade use could expand to others for use with other student data as use of it would no longer be so necessarily tied to the Data Warehouse.

**Student experience 4: Students are best served when the University can officially account for all students with the State, and demonstrate its compliance with the growing range of regulations and policy changes in many areas including student enrollment, financial aid, athletic eligibility, homeland security, and others.**

By the upgrade allowing more flexible use of this tool for non-Data Warehouse data sources, the upgrade would enable easier ad hoc integration of data from disparate systems to ensure timely compliance (Goal 2) and accuracy in any student census (Goal 5).

**Critical issue 5: Governance, funding, structure**

*The current budget and funding process obscures the true nature of the costs of maintaining, much less expanding, these central administrative systems, whose yearly budgets cannot be simply traded off annually against new proposals for IT spending...*

This budget proposal should be considered as part of the base cost of operating a Data Warehouse and of expanding to an Enterprise Data Warehouse utility.

**Critical issue 6: Expertise**

The CPU-based licensing approach and Mac OS support will both remove previous roadblocks to adoption of the Hyperion tool by owners of large datasets outside the data warehouse, which would in turn create a larger user base for this product and more transferable expertise among campus analysts.

2. **IMPACT**

An upgrade could be done directly to System 9 early in FY 07-08, effectively avoiding an upgrade/conversion cycle without risk.

The new contract with Hyperion will allow the latest version of the Hyperion reporting tool to be implemented with licensing that supports campus-wide use of the product. It offers increased functionality and addresses problems with the currently installed version, including the following:

- Allows the campus to use a broader variety of operating systems and browsers, which would reduce support costs for campus departments, Administration, and IST.
- Allows customized unit reporting that will enable users to become more self-sufficient in creating and maintaining their own reports. Provides users a central location to save, publish and share reports to their own departmental/individual folders.
- Allows integration within the tool of data from disparate sources.
- The change in the licensing model from per-seat licenses model to a CPU-licenses model will enable us to perhaps double the number of users we could service with the same software. This potential to extend the platform to other areas of the campus not currently serviced adds great value to the utility of the EDW.
3. Risk Assessment

The primary risk in this situation would be not funding this request.

Another risk is that we continue with Hyperion when switching to another BI tool might be the better course. Initially, the cost of the Enablement Fee by Hyperion was sufficiently high that an RFP process was begun in order to make this a competitive selection. There were additional concerns that the long-term needs of the campus from a BI tool were not completely defined. With the substantially lower negotiated price, the cost and strategic benefits of using Hyperion 9 for an intermediate term while going through an RFI process to assess the competitive market and refine business needs were determined to be significant.

4. Innovation

The new Hyperion product will allow easier and more organized sharing of customized queries within departments and between departments. It will also provide a better foundation for the analysis required for the conversion to Activity Based Budgeting.

5. Funding Model

Provide temporary funding in the amount of $125,000 to partially fund the Hyperion System 9 enablement fee. Business and Technology Solutions will cover the remaining $43,000 of the one-time “Enablement fee”, as well as the $16,800 annual maintenance costs.

Funding was requested at VCAC on March 15 and they acknowledged that this is something that UCB must fund. VCAC being short of funds, agreed that VC Brostrom and CIO Waggener would front the $125,000 in funds necessary to allow the purchase to move ahead directed that we request the funds through the upcoming budget cycle.
<table>
<thead>
<tr>
<th>Summary of funding: campus vs other</th>
<th>ACTUAL</th>
<th>PROJECTED</th>
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<td>FY 05-06</td>
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<td><strong>Campus funding sources</strong></td>
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<td><strong>Other funding sources</strong></td>
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<td><strong>TOTAL ALL FUNDING SOURCES</strong></td>
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**Note:** In accordance with the University’s accounting system, positive numbers are expenses or deficits, while negative numbers are funding or surpluses.