

Hyperion Planning User Manual

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Background to the implementation of Hyperion Planning

The previous processes for planning and budgeting were document based, primarily in Excel spreadsheets, inhibiting effective collaboration, consolidation and analysis. There was poor visibility of outputs (student FTEs and fee income) at Department and Faculty levels and a reliance on central Finance to provide this; Departments could only access their outputs once all Departments in all Faculties had completed the process. There was no version control, a lack of adequate security and the use of multiple, disparate data sources. Data collection was therefore time consuming, leading to the planning process taking longer than necessary.

Hyperion Planning is an application which forms part of the Oracle suite of products owned by College; this facilitates financial planning in a more efficient manner than spreadsheet-based methods. “Project Delphi” was set up in 2018 within Financial Management to investigate the possibility of using Hyperion Planning to enhance the College’s student number and tuition fee income planning

processes. After developing the application for College's needs, proof-of-concept testing has been carried out and the application is now fit for purpose. Demonstrations to Faculty Finance Officers, Departmental Operating Managers and Departmental users provided invaluable feedback that has enabled the further development of the most user-friendly way in which to implement the system. As a result, in December 2019 the Project Board took the decision to roll out the software for use in the 2020 Planning Round.

Advantages of using Hyperion Planning

The benefits of using the Hyperion Planning application are that multiple planners can access planning information simultaneously, with no need to distribute and share Excel spreadsheets. This will result in a reduction of the time taken to produce student number and tuition fee income forecasts and plans. Centrally managed Hyperion Planning models can be run by planners on demand, removing the need to manually collect information from Departments and Faculties, and to redistribute outputs calculated by Financial Planning and Analysis. Planning information is available to users in near real time, allowing planners to assess the impact of any changes that they make on demand, rather than having to wait for central Finance to consolidate and redistribute. Standardised templates will enable a more consistent approach with improved accuracy of data entry and data validation. The system will provide a single source of truth for student planning data.

Only intake numbers for the first year of each programme (for both headcount and fees) need to be entered into the system; the application will automatically calculate the continuing students and fees for programme years 2-6, although calculated numbers can be overridden by end users.

How Hyperion Planning works

Hyperion Planning can be accessed either via the web or through an Excel spreadsheet. Mac users need to use the web, as unfortunately the Oracle Excel Add-in necessary to facilitate the spreadsheet option is unavailable for downloading onto a Mac.

Once users have accessed Hyperion Planning, they are presented with task lists which guide them through the various steps that make up the planning process. This enables process management and monitoring.

Each task in a task list is linked to either a form, a calculation or a process:

- Forms are used for data entry or for reviewing output.
- Calculations use data entered by the user and by central Finance to calculate output figures, for example fee income.
- Processes include submitting entered data to the application itself or submitting a plan from a Department to a Faculty.

Accessing Hyperion Planning via the web

The College's Hyperion Planning application can be accessed using a web browser at the following location:

<https://epmprd.ad.ic.ac.uk/workspace/index.jsp>

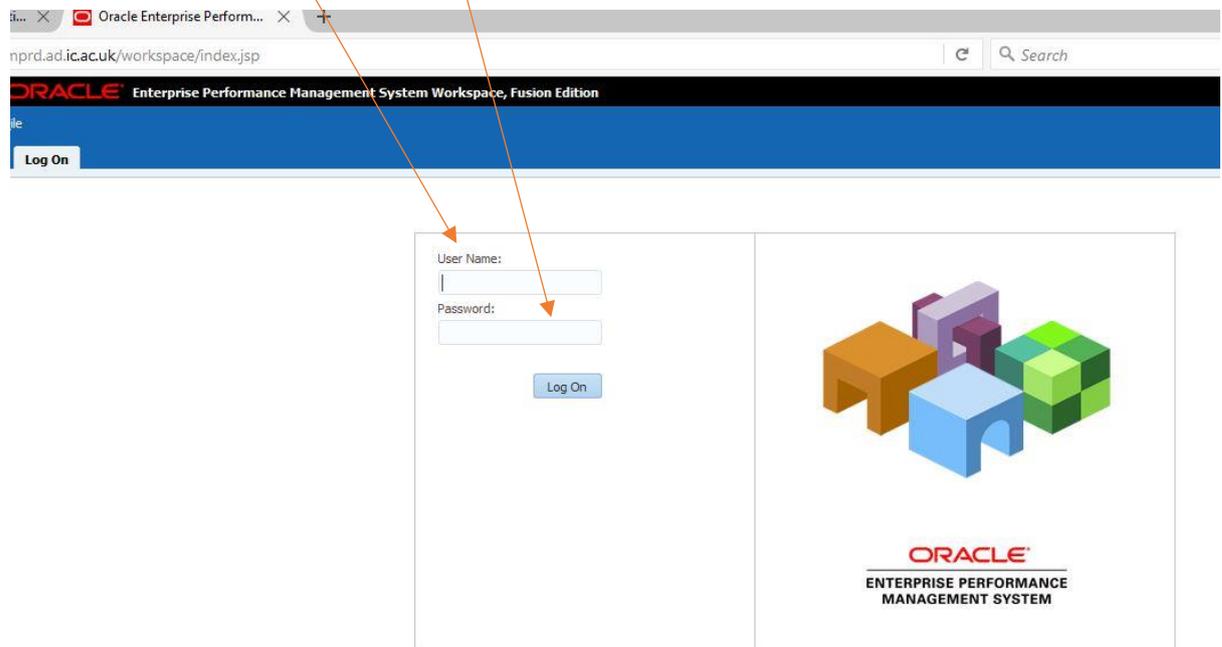
Hyperion Planning is compatible with the following browsers:

1. Firefox;
2. Internet Explorer.

Please note that Hyperion Planning is NOT compatible with Google Chrome, Microsoft Edge and Safari.

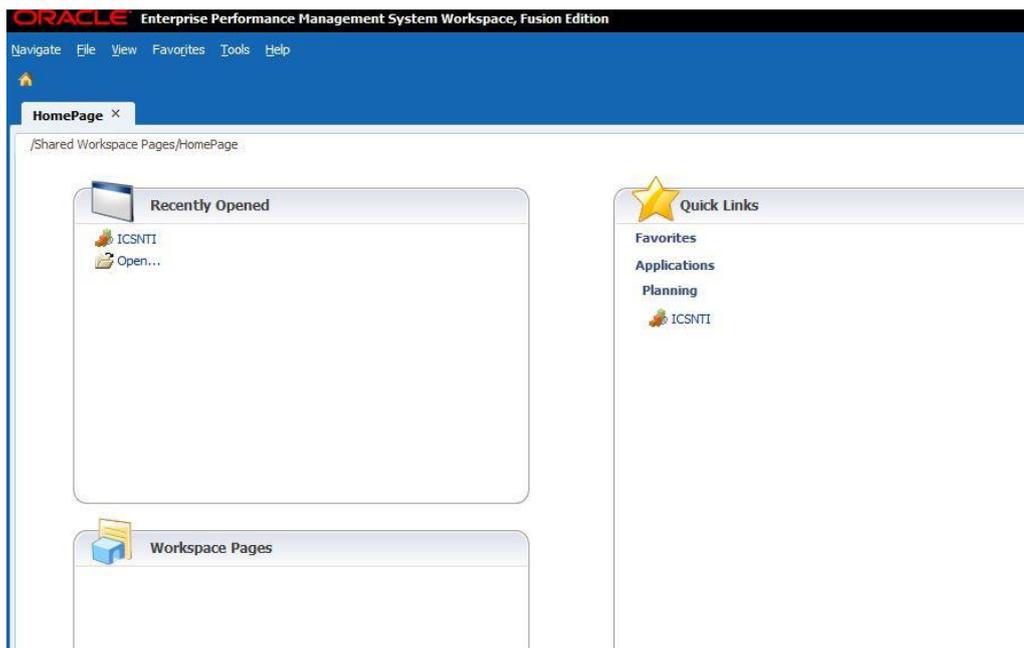
The site can only be accessed from within the College's network; remote workers will need to connect to the College network via VPN or via their College computer using remote desktop.

Once you have entered the url above, you will see the landing page shown below. Log in using your usual College username and password and then click onto the 'Log on' button.

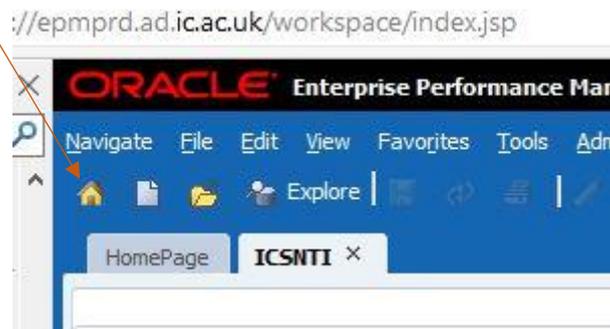


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You are now connected to Hyperion Planning and will see this home page:



The home page can be reached at any time by clicking onto the home page icon on the top left-hand corner of the page:



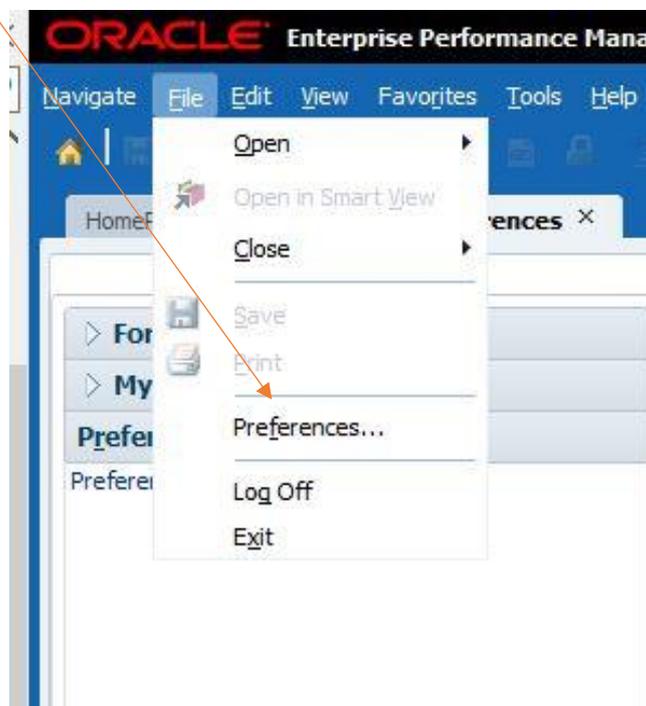
Set user preferences

The first time you login into Hyperion Planning you will need to set your user preferences. This is a one-time only activity which must be done the first time you use the application. User preferences can subsequently be changed but there should be no regular need to do so.

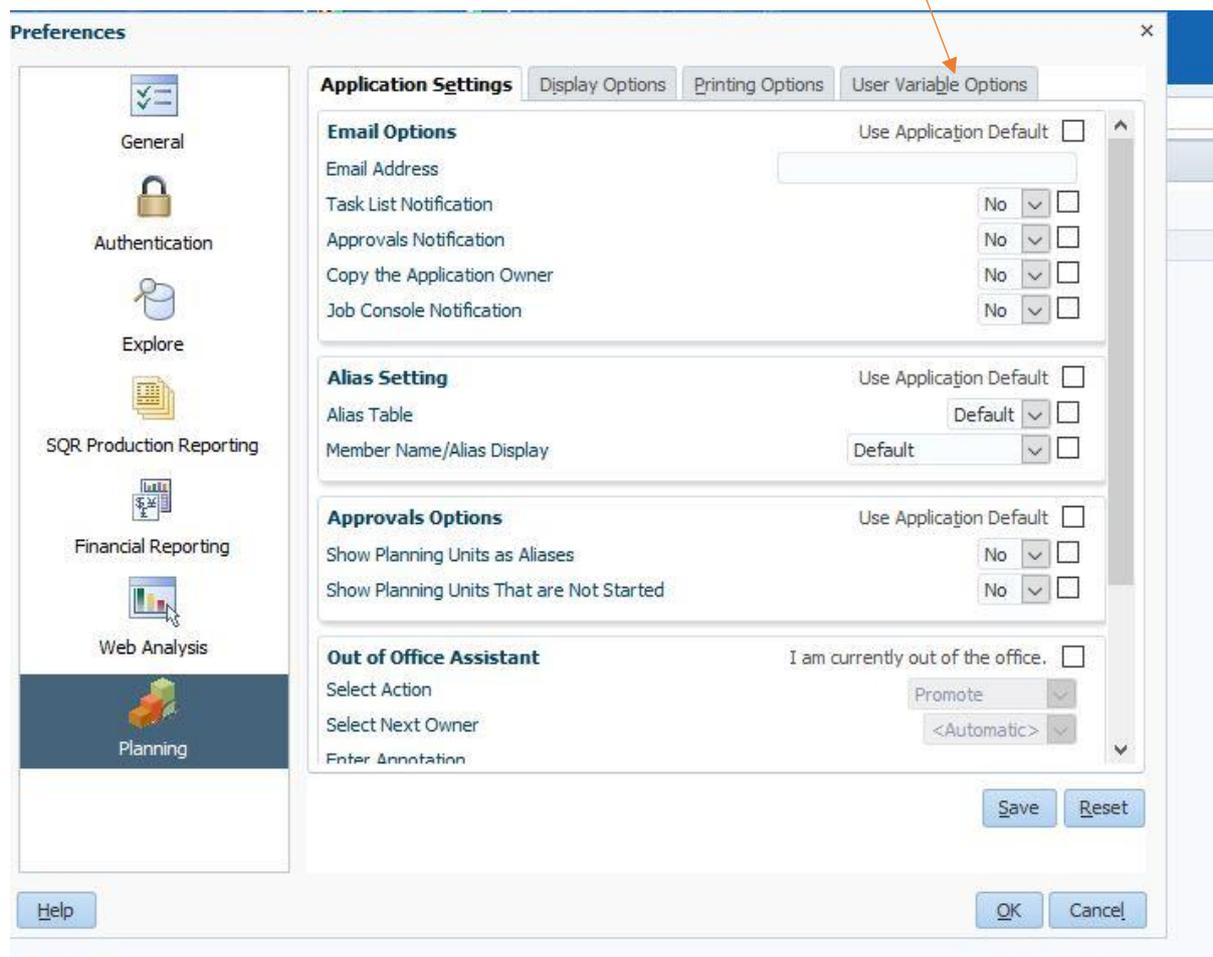
User preferences streamline the Hyperion Planning experience by setting default values to manage how Hyperion looks to you, the end user. It also makes planning information visible by default, for example by setting which Cost Centres the user can see.

Open user preferences

To set your user preferences open the preferences options by selecting File->Preferences from the Hyperion toolbar:



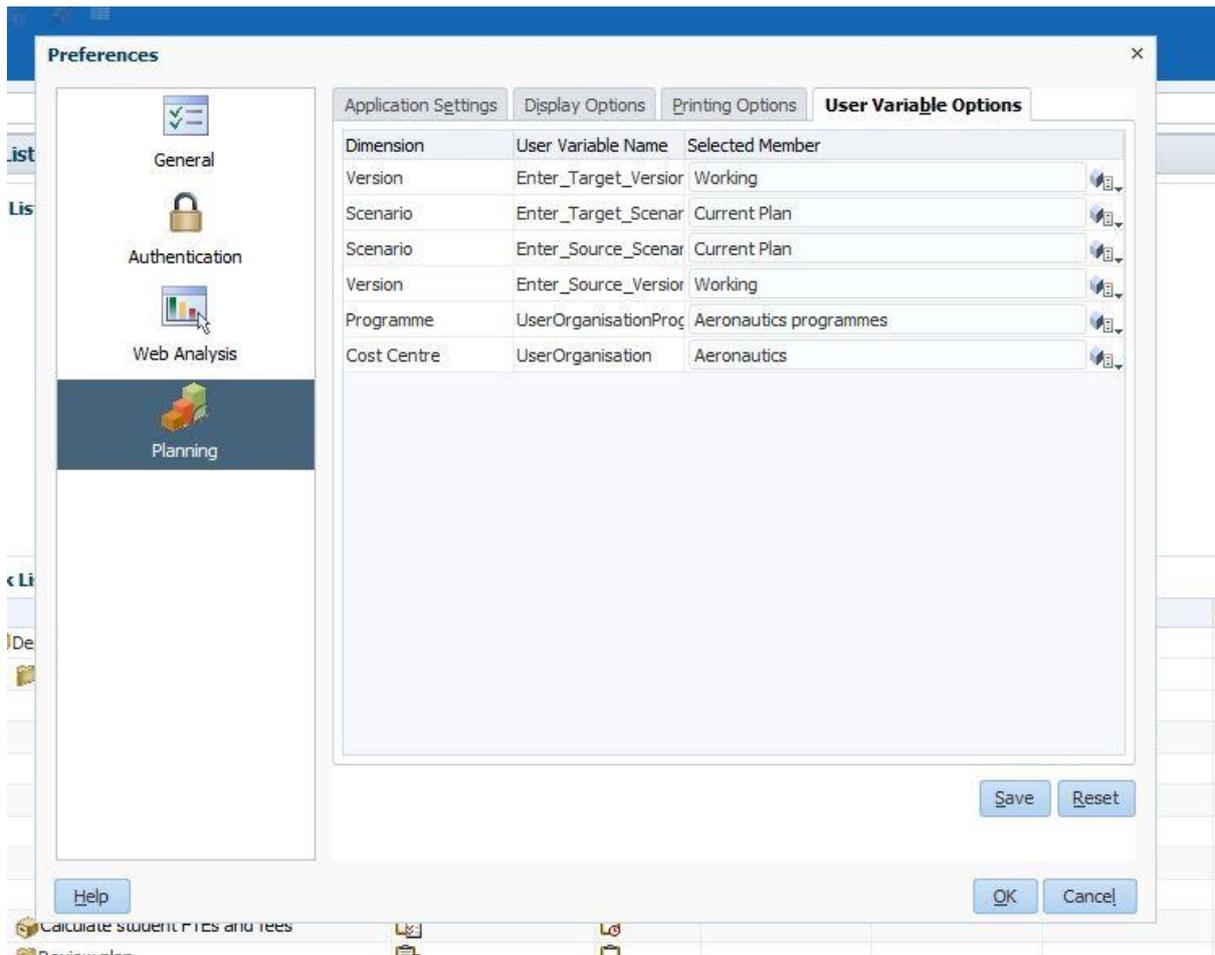
The following window will open; navigate to the User Variable Options tab:



Set the default user preferences as follows:

Variable	Value	Comment
Enter_Target_Version	Working	Default value
Enter_Target_Scenario	Current Plan	Default value
Enter_Source_Scenario	Current Plan	Default value
Enter_Source_Version	Working	Default value

Set your user specific preferences by typing in the name of the programmes for which you are responsible, for example 'Aeronautics UG programmes' next to the Programme variable. Enter the name of your department next to the Cost Centre variable. The following example is for a user in the Department of Aeronautics. Once you have entered the variables, click on the 'Save' button at the bottom right-hand corner of the window.



A full list of users with User Ogranisation and User Organisation Programmes is available in Appendix I at the end of this document.

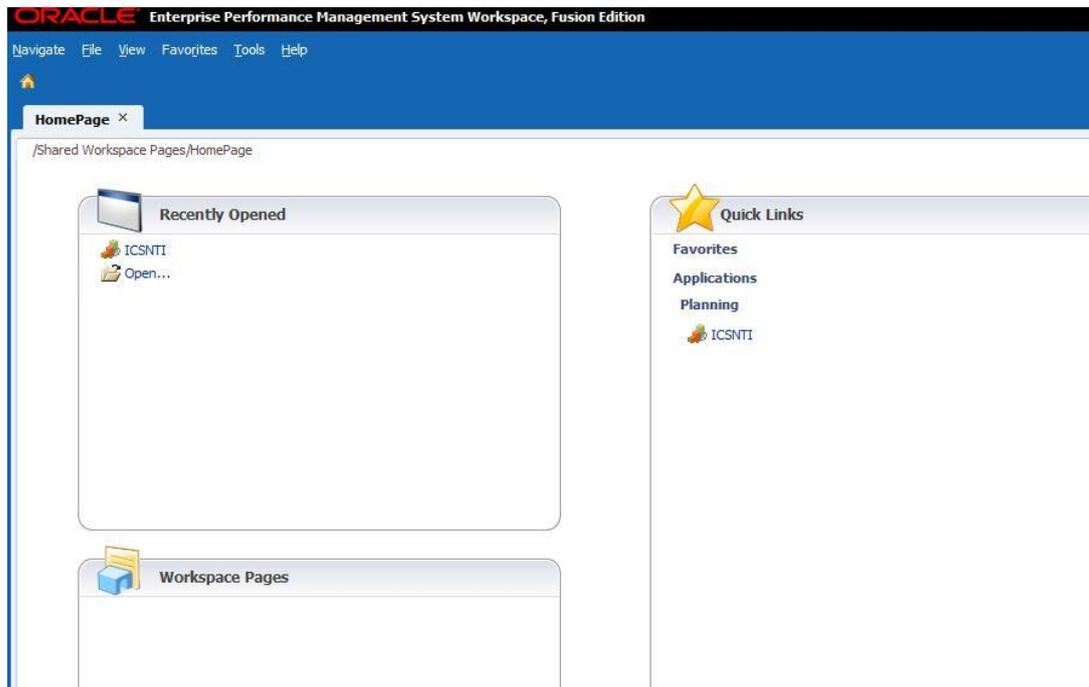
Please note that the screenshots below are from a Department of Aeronautics test user point of view so will show only Aeronautics programmes; your user access will determine the programmes that you are able to view when you log in and should only be those you need to forecast or plan for.

Department planning

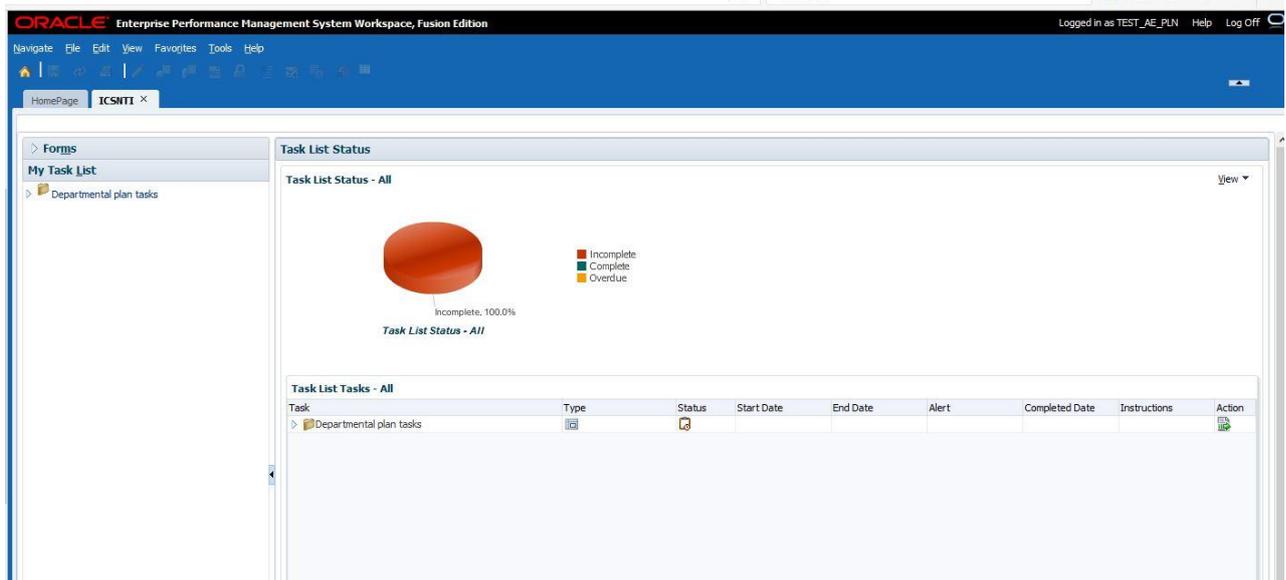
There are four activities that need to be carried out for Department planning: entering programme student headcount by financial year, running the calculations, reviewing and revising where necessary, and finally submitting the plan. Task lists within Hyperion Planning will sequentially guide you through the process step-by-step.

Begin by logging in to Hyperion Planning as detailed on page 2. If you have already set your user preferences, you will not need to do this again. Otherwise return to page 4 for guidance on how to set

up your user preferences. Access the student number and tuition fee income application (ICSNTI) by clicking on to the 'ICSNTI' icon on the home page:



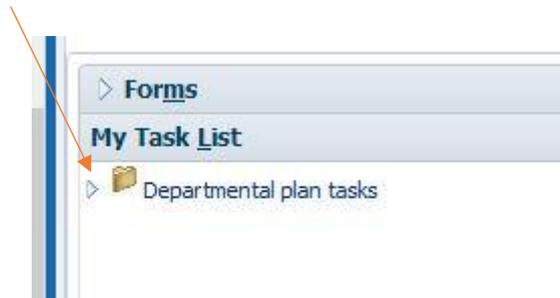
The following page will then appear:



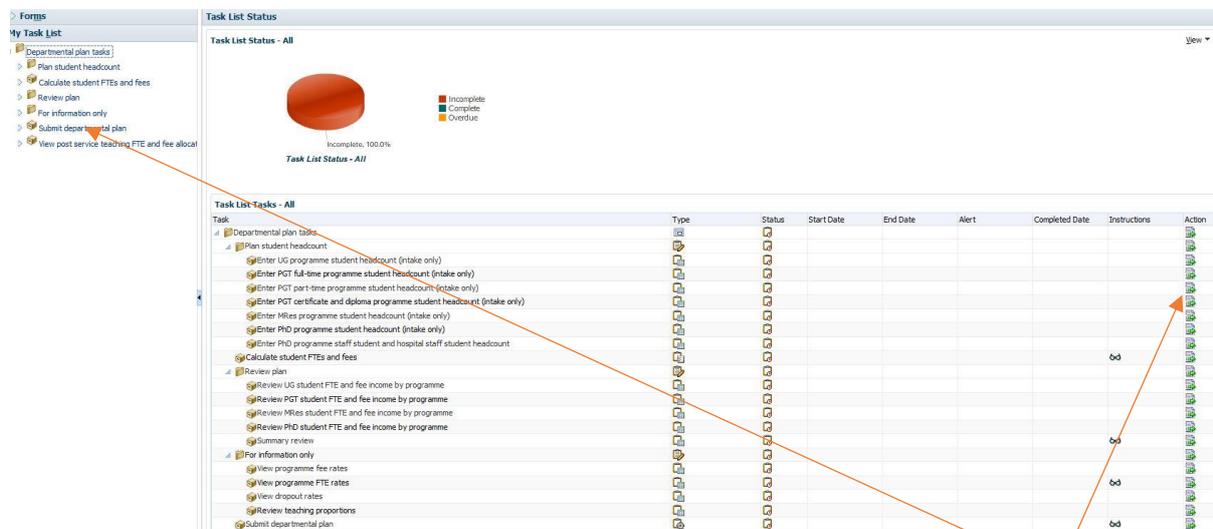
You will see a task list called 'My Task List'. This includes everything that you need to complete for the Planning Round. The pie chart to the right shows how many of the tasks you have completed and what is still left to do.

Plan Student Headcount

The first task in the list is to plan student headcount. To expand your task list, click onto the arrow next to the Departmental plan tasks:



The following further sub-tasks should appear:

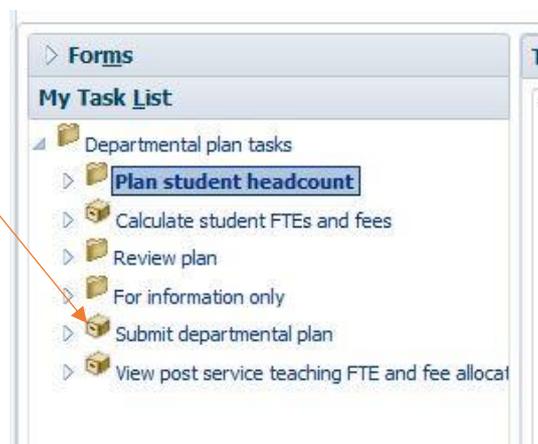


A screenshot of a software interface showing 'Task List Status' and 'Task List Tasks'. The 'Task List Status' panel shows a pie chart with a legend for 'Incomplete', 'Complete', and 'Overdue'. The 'Task List Tasks' panel shows a table with columns: Task, Type, Status, Start Date, End Date, Alert, Completed Date, Instructions, and Action. The 'Task List Tasks' table is expanded to show sub-tasks under 'Departmental plan tasks'. An orange arrow points from the 'Departmental plan tasks' folder icon in the left-hand panel to the 'Task List Tasks' table. Another orange arrow points from the 'Action' column of the 'Task List Tasks' table to the 'Plan student headcount' task.

Task	Type	Status	Start Date	End Date	Alert	Completed Date	Instructions	Action
Departmental plan tasks								
Plan student headcount								
Enter UG programme student headcount (intake only)								
Enter PGT full-time programme student headcount (intake only)								
Enter PGT part-time programme student headcount (intake only)								
Enter PGT certificate and diploma programme student headcount (intake only)								
Enter MRes programme student headcount (intake only)								
Enter PhD programme student headcount (intake only)								
Enter PhD programme staff student and hospital staff student headcount								
Calculate student FTEs and fees							bd	
Review plan								
Review UG student FTE and fee income by programme								
Review PGT student FTE and fee income by programme								
Review MRes student FTE and fee income by programme								
Review PhD student FTE and fee income by programme								
Summary review							bd	
For information only								
View programme fee rates								
View programme FTE rates								
View dropout rates								
Review teaching proportions								
Submit departmental plan							bd	

You can navigate through the task lists in two ways; either through the panel on the left-hand side, or by clicking on to the icon under the 'Action' column on the right-hand side of the screen.

Some tasks, such as 'Departmental plan tasks' and 'Plan student headcount' are header tasks with no forms or calculations associated with them. These show as folder icons in the task list. Those tasks that you need to complete are represented not by the folder icon but by a square shape containing a black dot:



Enter student headcount

The tasks within Plan student headcount are to enter the planned student headcounts for each year of the Plan, each programme and each residency.

There are seven data entry forms in the first task: one for undergraduates, three for postgraduate taught students (one each for PGT full time, PGT part time and PGT certificates/diplomas), one for MRes students and two for PhD students (one for students, the other for staff students). Depending upon your role/Faculty you may not need to use all of these forms.

To open a form, double click on its name. Most of the cells in the spreadsheet are greyed out; this means that they are read-only and cannot be edited.

The example form below is for entering undergraduate headcount. You will see that prior years have been pre-populated with actual student headcount data to act as a guide. The white cells in the 'Enter Student Headcount' rows are the ones in which you should enter your planned headcount numbers for the intake year –Year 1 intake, Late intakes for PhD students, and Year 1 continuing for Masters programmes starting mid-academic year:

itus x

Task List Status

Task - Enter UG programme student headcount (intake only) Task Instructions

Period: P13 Scenario: Current Plan Version: Working Cost Centre: No Cost Centre Date Analysis: Current Month

Intake Year: No Intake Year Programme Element: No Programme Element User/Organisation/Programme: Aeronautics programmes

			2018-2019					2019-2020					2020-2021					2021-		
			Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL
H401 - Aeronautical Engineering (MEng 4YFT)	Home	FT	47	48	32	30		47	46	38	26			47	46	38				
		Enter Student Headcount																		
	European Union	FT	32	32	23	20		29	32	25	20			29	32	25				
H410 - Aeronautical Engineering with a Year Abroad	Home	FT			2	1				1	2				1					
		Enter Student Headcount																		
	European Union	FT			5	3				6										
H420 - Aeronautical Engineering with a Year in Industry	Home	FT			6	1				4	6					4				
		Enter Student Headcount																		
	European Union	FT			4	6				3	4					3				
H415 - Aeronautics with Spacecraft Engineering (MEng)	Home	FT			2					7	2				7					
		Enter Student Headcount																		
	European Union	FT			7					5	7				5					

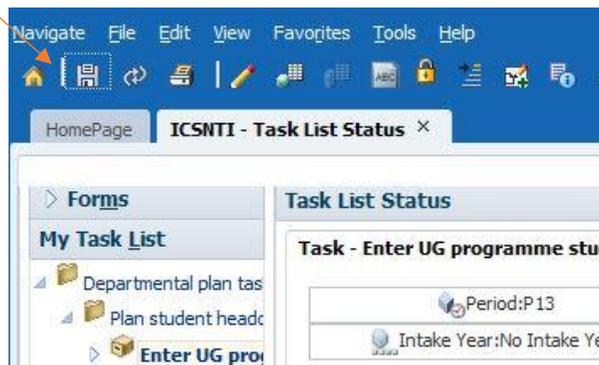
Student headcount numbers only need to be entered for the intake year for each financial year and residency type for each programme. Student headcount for other programme years of study (2+) will automatically be calculated and will populate the fields when you submit the data that you have entered in the form.

When you enter a headcount number into a cell the colour of the cell will change from white to yellow. This is to let you know that the cell has been edited:

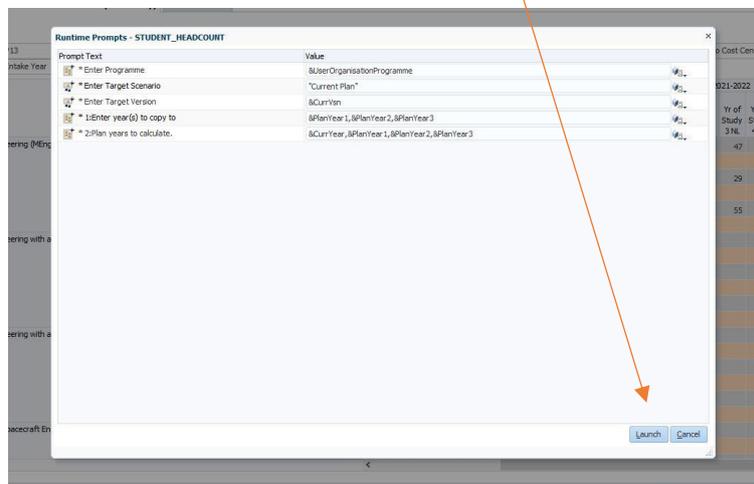
		2019-2020					2020-2021					2021-2022					2022-		
		Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL
Residency	FT Base student headcount	47	46	38	26		47	46	38										
	Enter Student Headcount						50												
an Union	FT Base student headcount	29	32	25	20		29	32	25				29	32					
	Enter Student Headcount																		
as	FT Base student headcount	55	50	47	32		55	50	47				55	50					
	Enter Student Headcount																		
	FT Base student headcount			1	2				1										
	Enter Student Headcount																		
an Union	FT Base student headcount				6														

Submit entered student headcount data

Once you have entered your headcount numbers into the form, you need to submit the data to the system for the calculations to be carried out. To do this, click on to the 'Save' icon in the top left-hand corner of the page:



The headcount for the remaining programme years of study will be calculated from historical data and the data that you have just entered; once you have clicked the Save button, Hyperion Planning will launch the calculation and you will see the following box. You do not need to change any of the values in the top 5 rows, simply click on to the 'Launch' button at the bottom and the system will calculate the future years' headcounts based on your Year 1 Intake values:



The 'Base student headcount' rows show the automatically calculated headcounts for continuing years as well as Year of Study 1 Intake once you have submitted your data:

Scenario: Current Plan Version: Working Cost Centre: No Cost Cent

Programme Element: No Programme Element User Organisation Programme: Aeronautics programmes

			2019-2020					2020-2021					2021-2022			
Residency			Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL
			Home	FT	Base student headcount	47	46	38	26		50	47	46	38		
		Enter Student Headcount						50								
European Union	FT	Base student headcount	29	32	25	20			29	32	25					29
		Enter Student Headcount														
Overseas	FT	Base student headcount	55	50	47	32			55	50	47					55
		Enter Student Headcount														
Home	FT	Base student headcount			1	2					1					

Override automatically calculated continuing student headcount

If you wish to override the automatically calculated student headcounts for continuing students, for example for students going on/returning from interruption of studies, you can do so by entering revised headcount numbers into the orange coloured cells in the 'Enter Student Headcount' rows and saving the form as previously documented:

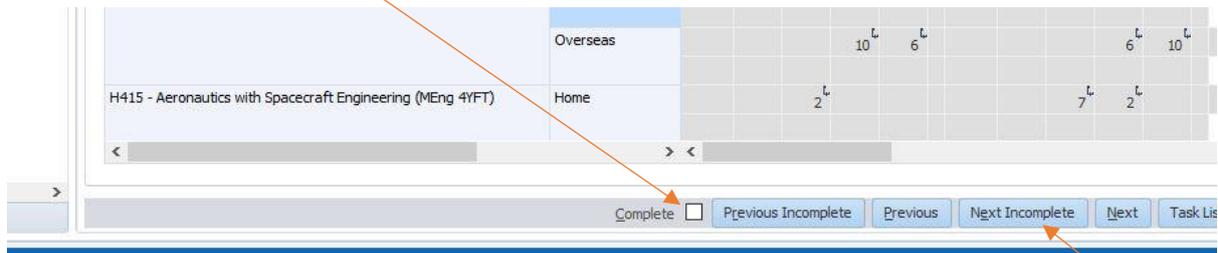
			2019-2020					2020-2021					2021-2022			
			Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL
			Base student headcount			47	46	38	26		50	47	46	38		
Enter Student Headcount								50	40							
Base student headcount			29	32	25	20			29	32	25				29	32
Enter Student Headcount																
Base student headcount			55	50	47	32			55	50	47				55	50
Enter Student Headcount																

Once you have submitted the data and saved the form you will see that the Base student headcount row has now been updated with your data for you to review and that this value has been used for continuing students in the following year:

User Organisation Programme: Aeronautics programmes

			2019-2020					2020-2021					2021-2022			
			Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL
			Base student headcount			47	46	38	26		50	40	46	38		50
Enter Student Headcount								50	40							
Base student headcount			29	32	25	20			29	32	25			29	32	
Enter Student Headcount																
Base student headcount			55	50	47	32			55	50	47			55	50	

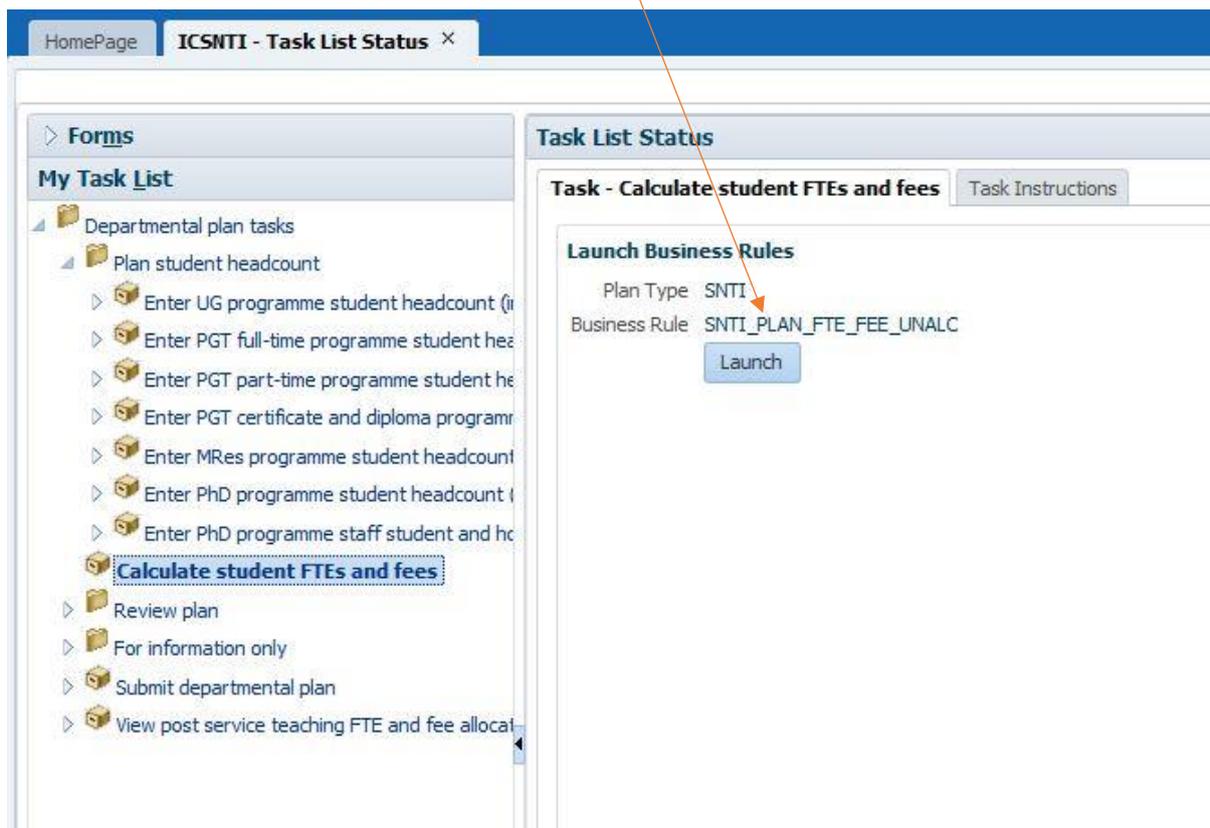
Once you have finished this task, click 'Complete' at the bottom of the screen to show that the task has been completed:



A tick mark will appear in the box. You can navigate to the next task by clicking on to the 'Next Incomplete' button or by using the drop down list in the panel on the left hand side of the screen.

Calculate student FTE and Fees

Once you have entered your student headcounts, the next step is to run the calculations that will generate the future years' FTEs and fee income. Again, to open the task, double click the name in the panel on the left-hand side of the screen. There is no form for this task, instead a box will appear that allows you to launch the calculations. Click the 'Launch' button and the calculations will run.



A pop-up box will let you know that the calculation has run successfully.

The calculations are as follows:

Student FTE = student headcount x programme FTE rate (this is set by Financial Planning and Analysis)

Student Fee = student FTE x programme fee rate for the year of study

Allocated student FTE = student FTE x teaching proportion

Allocated Fee = student fee x teaching proportion

Once you have finished this task, click 'Complete' at the bottom of the screen to show that the task has been completed as you did after entering the headcount data and submitting it (page 12).

Review plan

These tasks are for reviewing the output of the calculations. You can review by programme type (i.e. undergraduate, postgraduate taught etc.) or a total summary of the Department, which includes all programme types by looking at the Summary review form (task 3.5). The forms associated with these tasks are read-only and so the cells are greyed out.

The review form below shows the output of the calculations, FTEs and fees, for the entered headcounts:

Task List Status				Task - Review UG student FTE and fee income by programme			
Period:P13		Scenario:Current Plan		Version:Working		Cost Centre:No C	
Intake Year:No Intake Year		Programme Element:No Programme Element		Attendance Type:Total Attendance Type		User Organisation:Programme :	
				2019-2020	2020-2021	2021-2022	2022-2023
				> Total Programme Year of Study	> Total Programme Year of Study	> Total Programme Year of Study	> Total Programme Year of Study
H420 - Aeronautical Engineering with a Year in Industry (MEng 5YFT)	European Union	Student FTEs		6	3		
	Overseas	Student FTEs		14	4		
	Total Residency	Student FTEs		6	4		
	Total residency			4	3		
	Home	Student FTEs		11	6		
H415 - Aeronautics with Spacecraft Engineering (MEng 4YFT)	European Union	Student FTEs		21	13		
	Overseas	Student FTEs		9	7		
	Total Residency	Student FTEs		12	5		
	Home	Student FTEs		9	5		
	European Union	Student FTEs		30	17		
	Overseas	Student FTEs					
	Total Residency	Student FTEs		175	143	93	47
-	-	-		128	94	61	29
All UG Programmes	Home	Total student FTEs		210	166	105	55
All UG Programmes	EU	Total student FTEs		512	403	259	131
All UG Programmes	Overseas	Total student FTEs					
All UG Programmes		Total student FTEs					
	--			1,452,250	1,211,750	860,250	434,750
	--			980,500	795,500	564,250	268,250
	Student Fees			5,494,250	4,640,000	3,282,500	1,760,000
	Student Fees			19,888	9,250		
	Student Fees			55,500			
	Student Fees			177,000	90,000		
	Student Fees			59,200	37,000		
	Student Fees			39,775	27,750		
	Student Fees			312,700	180,000		
	Student Fees			83,250	64,750		
	Student Fees			111,000	46,250		

For information only

The next task, 'For information only', includes further review forms where you can view programme fee rates, FTE rates and teaching proportions. These are read-only. The example below shows the fee rates for the programme above:

		2019-2020			2020-2021			2021-2022
		Home	European Union	Overseas	Home	European Union	Overseas	
Undergraduate Programmes								
H401 - Aeronautical Engineering (MEng 4YFT)	Programme Year of Study 1 Intake	9,250	9,250	30,250	9,250	9,250	31,750	
	Programme Year of Study 2 Non-Late	9,250	9,250	30,000	9,250	9,250	31,000	9,250
	Programme Year of Study 3 Non-Late	9,250	9,250	29,500	9,250	9,250	30,500	9,250
	Programme Year of Study 4 Non-Late	9,250	9,250	29,500	9,250	9,250	30,000	9,250
H410 - Aeronautical Engineering with a Year Abroad (MEng 4YFT)	Programme Year of Study 1 Intake	9,250	9,250	30,250	9,250	9,250	31,750	
	Programme Year of Study 2 Non-Late	9,250	9,250	30,000	9,250	9,250	31,000	9,250
	Programme Year of Study 3 Non-Late	9,250	9,250	29,500	9,250	9,250	30,500	9,250
	Programme Year of Study 4 Non-Late	9,250	9,250	29,500	9,250	9,250	30,000	9,250
H420 - Aeronautical Engineering with a Year in Industry (MEng 5YFT)	Programme Year of Study 1 Intake	9,250	9,250	30,250	9,250	9,250	31,750	
	Programme Year of Study 2 Non-Late	9,250	9,250	30,000	9,250	9,250	31,000	9,250
	Programme Year of Study 3 Non-Late	9,250	9,250	29,500	9,250	9,250	30,500	9,250
	Programme Year of Study 4 Non-Late	9,250	9,250	29,500	9,250	9,250	30,000	9,250
H420 - Aeronautical Engineering with a Year in Industry (MEng 5YFT)	Programme Year of Study 5 Intake	9,250	9,250	29,500	9,250	9,250	30,000	9,250
H415 - Aeronautics with Spacecraft Engineering (MEng 4YFT)	Programme Year of Study 1 Intake	9,250	9,250	30,250	9,250	9,250	31,750	
	Programme Year of Study 2 Non-Late	9,250	9,250	30,000	9,250	9,250	31,000	9,250
	Programme Year of Study 3 Non-Late	9,250	9,250	29,500	9,250	9,250	30,500	9,250
	Programme Year of Study 4 Non-Late	9,250	9,250	29,500	9,250	9,250	30,000	9,250
Postgraduate Taught Programmes								
H1U6 - Advanced Computational Methods for Aeronautics Flow Management Fluid Stru	Programme Year of Study 1 Intake	13,250	13,250	31,250	14,000	14,000	32,500	
	Programme Year of Study 1 Intake	13,250	13,250	31,250	14,000	14,000	32,500	
	Programme Year of Study 2 Non-Late	12,900	12,900	31,000	13,500	13,500	32,000	14,300
H404 - Advanced Aeronautical Engineering (MSc 1YFT)	Programme Year of Study 1 Intake	13,250	13,250	31,250	14,000	14,000	32,500	
ISU1 - Composites: the Science, Technology and Engineering Application of Advanc	Programme Year of Study 1 Intake	13,250	13,250	31,250	14,000	14,000	32,500	
ISU124 - Composites: the science, technology and engineering application of adva	Programme Year of Study 1 Intake	13,250	13,250	31,250	14,000	14,000	32,500	
	Programme Year of Study 2 Non-Late	12,900	12,900	31,000	13,500	13,500	32,000	14,300
Postgraduate Research Masters Programmes								
H405 - Fluid Dynamics Across Scales [1+3] (MRes 1YFT)	Programme Year of Study 1 Intake	13,250	13,250	31,250	0	0	0	

Submit Plan

If you are happy with the output of the calculations, the next step is to submit the Departmental Plan to your Faculty Finance Officer for approval. If you are not happy with the output, you can return to a task and amend the headcount entries, recalculate and review again until you are satisfied.

To submit your plan, double click on 'Submit departmental plan' in the task list. A new screen will open as below. Make sure that the Scenario is set to 'Current Plan' and that the Version is 'Working':

The screenshot shows the 'Task List Status' window for the task 'Submit departmental plan'. The 'Scenario' is set to 'Current Plan' and the 'Version' is 'Working'. A 'Process Status' chart shows a single blue circle representing 'Under Review' at 100.0%. Below the chart is a table with columns for Planning Unit, Approvals Status, Sub-Status, Current Owner, Location, Total Value, Path, and Details. The table lists various departments such as Aeronautics, Bioengineering, Business School, Centre for Environmental Policy, Chemical Engineering, Chemistry, Civil and Environmental Engineering, Co-Curricular Studies, Computing, Data Science Institute, Department of Brain Sciences, Department of Immunology and Inflammation, Department of Infectious Disease, Department of Metabolism, Digestion and Reproduction, and Department of Surgery and Cancer.

You should see a list of Planning units that have the name of your Department. Each Department and Faculty has its own Planning unit:

Planning Unit	Approvals Status	Sub-Status	Current Owner	Location	Total Value	Path	Details
Chemical Engineering	Under Review		ICSNTI_PLNR_ChemEng	Chemical Eng			
Chemistry	Under Review		ICSNTI_PLNR_Chemistry	Chemistry			
Civil and Environmental Engineering	Under Review		ICSNTI_PLNR_CivilEng	Civil and Envi			
Co-Curricular Studies	Under Review		ICSNTI_PLNR_Non_Academic_PRG	Co-Curricular			
Computing	Under Review		ICSNTI_PLNR_Computing	Computing			
Data Science Institute	Under Review		ICSNTI_PLNR_DataSciInst	Data Science			
Department of Brain Sciences	Under Review		ICSNTI_PLNR_DeptBrainSci	Department c			
Department of Immunology and Inflammation	Under Review		ICSNTI_PLNR_DeptImmun&Inflam	Department c			

As the Department Planner, you have been set up in Hyperion Planning to belong to a user group called ICSNTI_PLNR_YourDepartmentName. For example for Computing, this is ICSNTI_PLNR_Computing. At the start of the planning process, your department's Planning unit is owned by your departmental user group, of which you are a member.

Next, you need to promote the Planning unit upwards to your Faculty Finance Officer for approval. Once you do this, ownership of the Planning unit transfers to your FFO. Highlight your Planning unit by clicking onto it, and then click 'Details':

Task List Status

Task - Submit departmental plan

Scenario: Current Plan | Version: Working | Go

Process Status: Under Review, 100.0%

Planning Unit	Approvals Status	Sub-Status	Current Owner	Location	Total Value	Path	Details
Aeronautics	Under Review		ICSNTI_PLNR_Aeronautics	Aeronautics			
Bioengineering	Under Review		ICSNTI_PLNR_Bioengineering	Bioengineering			
Business School	Under Review		ICSNTI_PLNR_BS_RW	Business School			
Centre for Environmental Policy	Under Review		ICSNTI_PLNR_CEP	Centre for Environme			
Chemical Engineering	Under Review		ICSNTI_PLNR_ChemEng	Chemical Engineering			
Chemistry	Under Review		ICSNTI_PLNR_Chemistry	Chemistry			
Civil and Environmental Engineering	Under Review		ICSNTI_PLNR_CivilEng	Civil and Environment			
Co-Curricular Studies	Under Review		ICSNTI_PLNR_Non_Academ	Co-Curricular Studies			
Computing	Under Review		ICSNTI_PLNR_Computing	Computing			
Data Science Institute	Under Review		ICSNTI_PLNR_DataSciInst	Data Science Institute			
Department of Brain Sciences	Under Review		ICSNTI_PLNR_DeptBrainSci	Department of Brain			
Department of Immunology and Inflammation	Under Review		ICSNTI_PLNR_DeptImmun	Department of Immun			
Department of Infectious Disease	Under Review		ICSNTI_PLNR_DeptInfect	Department of Infect			
Department of Metabolism, Digestion and Reproduction	Under Review		ICSNTI_PLNR_DeptMetDig	Department of Metab			
Department of Surgery and Cancer	Under Review		ICSNTI_PLNR_DeptSurger	Department of Surger			

Another new screen will open as shown below. Click on to the 'Actions' drop-down menu and select 'Change Status'.

Planning Unit: Computing

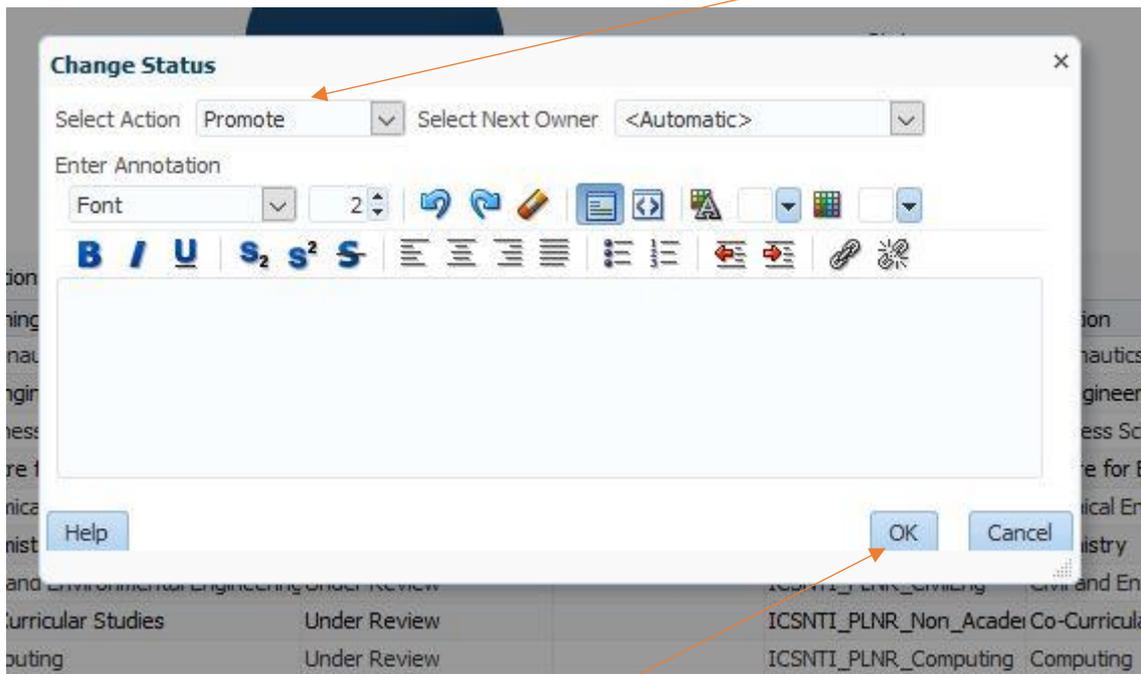
History | Annotations

Under Review, 100.0%

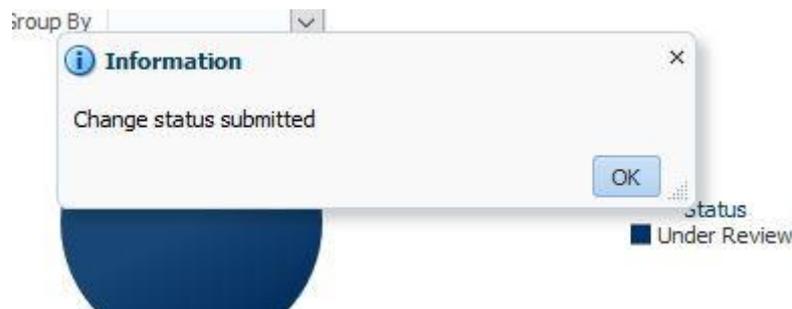
Actions | View | Detach

Approvals Status: Under Review | Owner: cunningg

A new box will appear. Make sure that you select the 'Promote' action:



Then click the 'OK' button at the bottom of the box. A pop-up will show that the plan has been submitted successfully:



Click the 'OK' button to close the box.

Once you have finished this task, click 'Complete' at the bottom of the screen as before to show that the task has been completed. It is important for the overall coordination of the Planning Round by Financial Planning and Analysis that tasks are appropriately marked as either complete or incomplete.

You can check that your plan has been submitted by clicking on to the 'Refresh' icon:

The screenshot shows the 'Task List Status' interface for a 'Task - Submit departmental plan'. It features a 'Process Status' section with a pie chart showing 'Under Review, 100.0%'. Below this is a table with columns: Planning Unit, Approvals Status, Sub-Status, Current Owner, Location, Path, and Details. The 'Current Owner' column is circled in red, and an arrow points from the 'Refresh' icon in the top right corner to this column.

Planning Unit	Approvals Status	Sub-Status	Current Owner	Loc	Path	Details
Computing	Under Review		ICSNTI_PLNR_FOE	Fat		
Data Science Institute	Under Review		ICSNTI_PLNR_DataSciInst	Da		
Department of Brain Sciences	Under Review		ICSNTI_PLNR_DeptBrainSci	Dej		
Department of Immunology and Inflammation	Under Review		ICSNTI_PLNR_DeptImmunol&Inflam	Dej		
Department of Infectious Disease	Under Review		ICSNTI_PLNR_DeptInfectDisease	Dej		
Department of Metabolism, Digestion and Reproducti	Under Review		ICSNTI_PLNR_DeptMetDigRepro	Dej		

Once refreshed, you will see that ownership of the planning unit has now passed to your Faculty user group (your Faculty Finance Officer and their team).

If the approver requires any changes, they will return the plan to you for modification. They will do this by rejecting the plan, at which point it will be owned by you again so you can make any changes requested.

Once you have made the relevant changes to the plan, resubmit following the steps above.

Further Assistance

Queries regarding the use of Hyperion Planning should be directed to the Financial Planning and Analysis (FP&A) team via the team email address:

financialplanning@imperial.ac.uk

Catherine Cunningham (FP&A Manager)

Andrew Stagg (Head of FP&A)

Appendix I

User	UserOrganisationProgramme	UserOrganisation
Alex Gibbs	Energy Futures Lab programmes	Energy Futures Lab
Alice Ashley-Smith	Electrical and Electronic Engineering programmes	Electrical and Electronic Engineering
Alison Cambrey	Department of Surgery and Cancer programmes	Department of Surgery and Cancer
Amrik Thethi	Faculty of Engineering programmes	Faculty of Engineering
Anita Stubbs	Department of Brain Sciences Programmes	Department of Brain Sciences
Anita Stubbs	Department of Immunology and Inflammation programmes	Department of Immunology and Inflammation
Anita Stubbs	Department of Infectious Disease programmes	Department of Infectious Disease
Anita Stubbs	Department of Medicine programmes	Faculty of Medicine
Anita Stubbs	Department of Metabolism, Digestion and Reproduction programmes	Department of Metabolism, Digestion and Reproduction
Anita Stubbs	Institute of Clinical Sciences programmes	Institute of Clinical Sciences
Anne O'Neill	Computing programmes	Computing
Anthony Fitzgerald	Life Sciences programmes	Life Sciences
Anusha Sri-Pathmanathan	Chemical Engineering programmes	Chemical Engineering
Bernadette Kuforiji	Faculty of Engineering programmes	Faculty of Engineering
Chris Sanders	Bioengineering programmes	Bioengineering
Cora O'Reilly	Materials programmes	Materials
Damian Cerase	Computing programmes	Computing
Emma Watson	Earth Science and Engineering programmes	Earth Science and Engineering
Erika Rosivatz	Chemistry programmes	Chemistry
Francesca Bertolini	School of Medicine programmes	Faculty of Medicine
Gemma Williamson	Department of Brain Sciences Programmes	Department of Brain Sciences
Gemma Williamson	Department of Immunology and Inflammation programmes	Department of Immunology and Inflammation
Gemma Williamson	Department of Infectious Disease programmes	Department of Infectious Disease
Gemma Williamson	Department of Metabolism, Digestion and Reproduction programmes	Department of Metabolism, Digestion and Reproduction
Gemma Williamson	Institute of Clinical Sciences programmes	Institute of Clinical Sciences
Hannah Davy	Institute of Molecular Science and Engineering programmes	Institute of Molecular Science and Engineering
Hayley Atkinson	School of Public Health programmes	School of Public Health
Heidi Vickery	Non Academic programmes	Non Academic
Jackie O'Neill	Aeronautics programmes	Aeronautics
James Andrewes	Life Sciences programmes	Life Sciences
Jane Lac	Institute for Security Science and Technology programmes	Institute for Security Science and Technology
Josie Howard	Mechanical Engineering programmes	Mechanical Engineering
Julian van Lare	Faculty of Natural Sciences programmes	Faculty of Natural Sciences
Karen Lyle	Centre for Environmental Policy programmes	Centre for Environmental Policy
Kate Lewis	Mechanical Engineering programmes	Mechanical Engineering
Katerina Koutsantoni	National Heart and Lung Institute programmes	National Heart and Lung Institute
Kay Hancox	Electrical and Electronic Engineering programmes	Electrical and Electronic Engineering
Lindsey Anne Cumming	Civil and Environmental Engineering programmes	Civil and Environmental Engineering
Lorna Stevenson	Bioengineering programmes	Bioengineering
Luke White	Physics programmes	Physics
Melanie Albright	Bioengineering programmes	Bioengineering
Melody Saunders	Business school programmes	Business School
Noeline Joseph	Business school programmes	Business School
Pat Evans	Life Sciences programmes	Life Sciences
Ravinder Panesar	Aeronautics programmes	Aeronautics
Rebecca Rahman	Mechanical Engineering programmes	Mechanical Engineering
Rebecca Smith	Earth Science and Engineering programmes	Earth Science and Engineering
Richard Jones	Mathematics programmes	Mathematics
Ritu Saha	Computing programmes	Computing
Sam McKenney	Design Engineering programmes	Design Engineering
Samantha Symmonds	Earth Science and Engineering programmes	Earth Science and Engineering
Sian Haynes	Aeronautics programmes	Aeronautics
Simon Bailey	Mechanical Engineering programmes	Mechanical Engineering
Simon Passey	Faculty of Medicine programmes	Faculty of Medicine
Steph Pendlebury	Institute of Molecular Science and Engineering programmes	Institute of Molecular Science and Engineering
Steve Aldous	Faculty of Engineering programmes	Faculty of Engineering
Susi Underwood	Chemical Engineering programmes	Chemical Engineering
Tim Ovenden	Faculty of Natural Sciences programmes	Faculty of Natural Sciences
Tim Venables	Bioengineering programmes	Bioengineering
Ting Ting Wu	Faculty of Medicine programmes	Faculty of Medicine
Vasso Papaioannou	Faculty of Medicine programmes	Faculty of Medicine
Zarine Khurshid	Institute for Security Science and Technology programmes	Institute for Security Science and Technology