



## Hyperion Planning User Manual

### Contents

Background to the implementation of Hyperion Planning.....	2
Advantages of using Hyperion Planning .....	2
How Hyperion Planning works.....	2
Accessing Hyperion Planning in Excel .....	3
SmartView Installation Guide .....	3
Set your SmartView preferences.....	4
Connect to Hyperion Planning .....	7
Set user preferences .....	8
Student number and tuition fee income guidance for a Departmental user .....	12
Department planning.....	12
1.0 Plan Student Headcount .....	13
Enter student headcount .....	14
Submit entered student headcount data .....	15
Override automatically calculated continuing student headcount .....	17
2.0 Calculate student FTE and Fees .....	19
3.0 Review plan .....	20
4.0 For information only .....	20
Submit Plan .....	21
Student number and tuition fee income guidance for a Faculty user .....	25
Faculty planning.....	25
Faculty plan task list.....	25
1.0 Update programme fee rates .....	25
2.0 Review Department Plan submissions.....	28
3.0 Submit Plan .....	30
4.0 For Information .....	31
Further Assistance.....	31
Appendix I .....	32

## 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. Feedback from key Departmental users during various demonstrations of the application suggested that the Excel method was preferred, so this is the method that will be implemented and is documented in this training manual.

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.

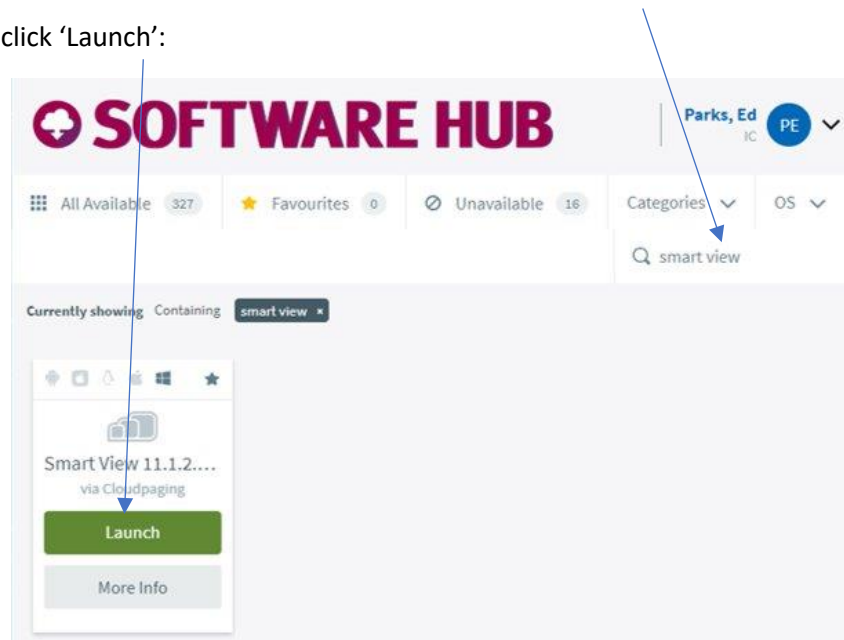
## Accessing Hyperion Planning in Excel

Hyperion Planning is accessed in Excel via an Add-in called SmartView. The task lists appear in a panel and the forms populate a tab in the Excel file, linked directly to the application. The SmartView Add-in is available from the ICT Software Hub and is easy to install and use.

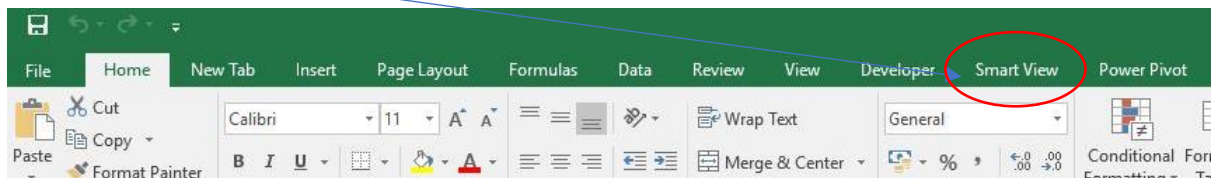
## SmartView Installation Guide

The following steps are one-time only; once completed, you will not need to repeat them each time you wish to use SmartView or Hyperion Planning. To download SmartView, head to the ICT software hub: <https://softwarehub.imperial.ac.uk/login>. Search for 'smart view':

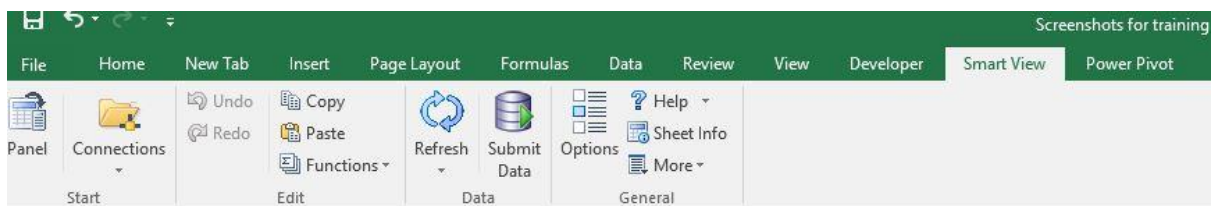
To download, click 'Launch':



Once downloaded, open a new Excel spreadsheet. You should see a new tab in the ribbon called SmartView:



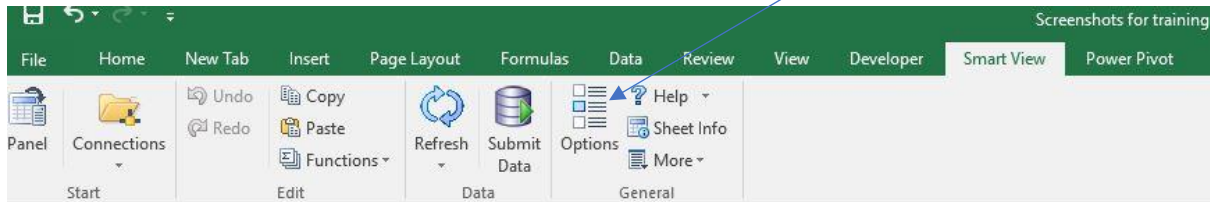
Click onto the SmartView tab and you will see the following ribbon:



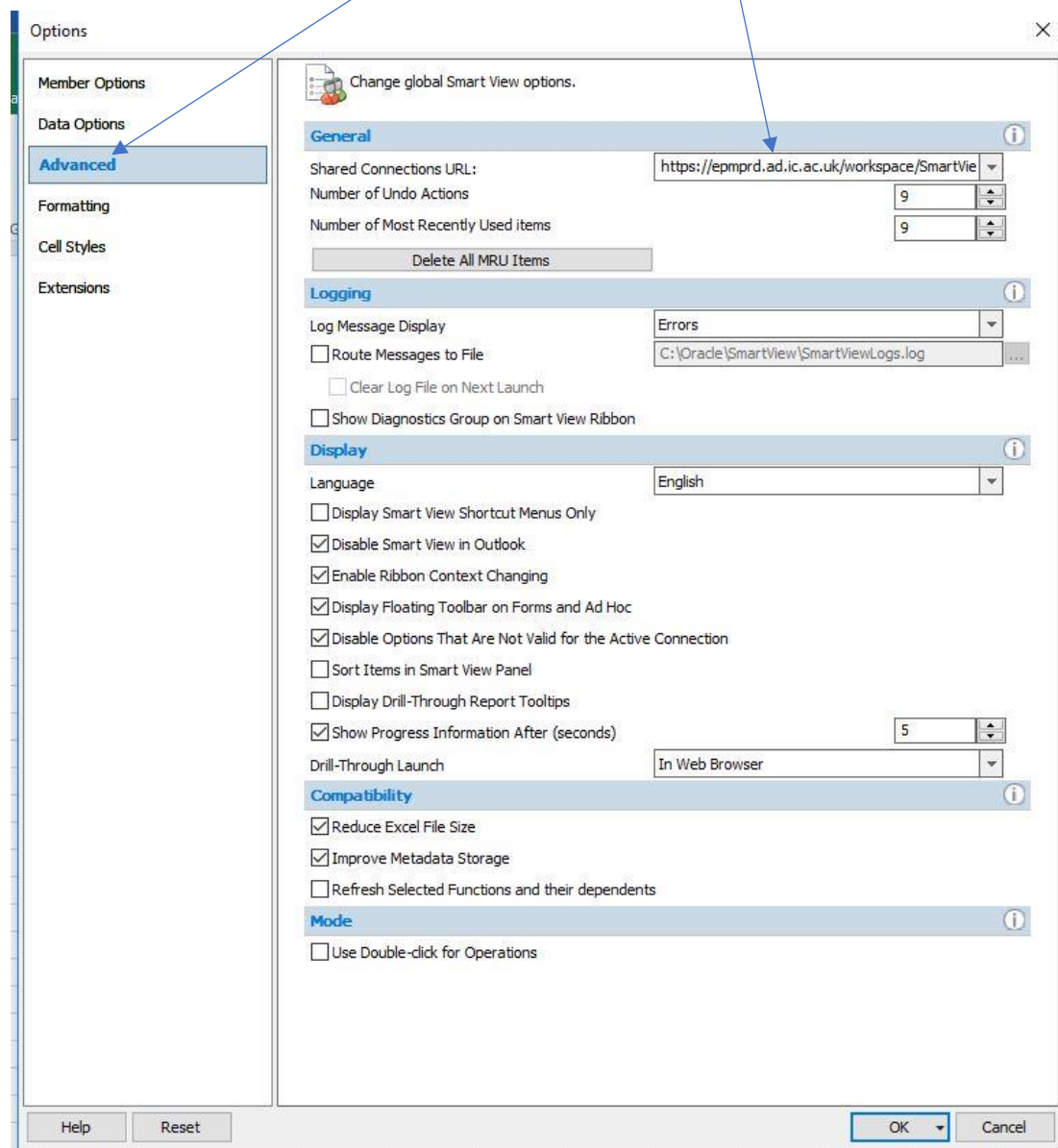
## Set your SmartView preferences

The following are settings that we recommend for you to make the most out of Hyperion Planning and for the application to display in the most user-friendly way. You only have to make these changes once, when you first download SmartView, as they save to your profile as default settings for when you next log in.

To set your default settings, within the SmartView ribbon, click 'Options':



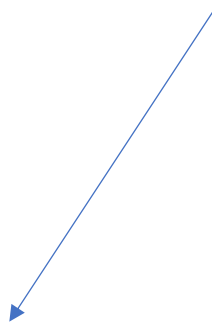
On the left-hand side of the box, click 'Advanced'. Enter the following link into the 'Shared Connections URL' field: <https://epmprd.ad.ic.ac.uk/workspace/SmartViewProviders>

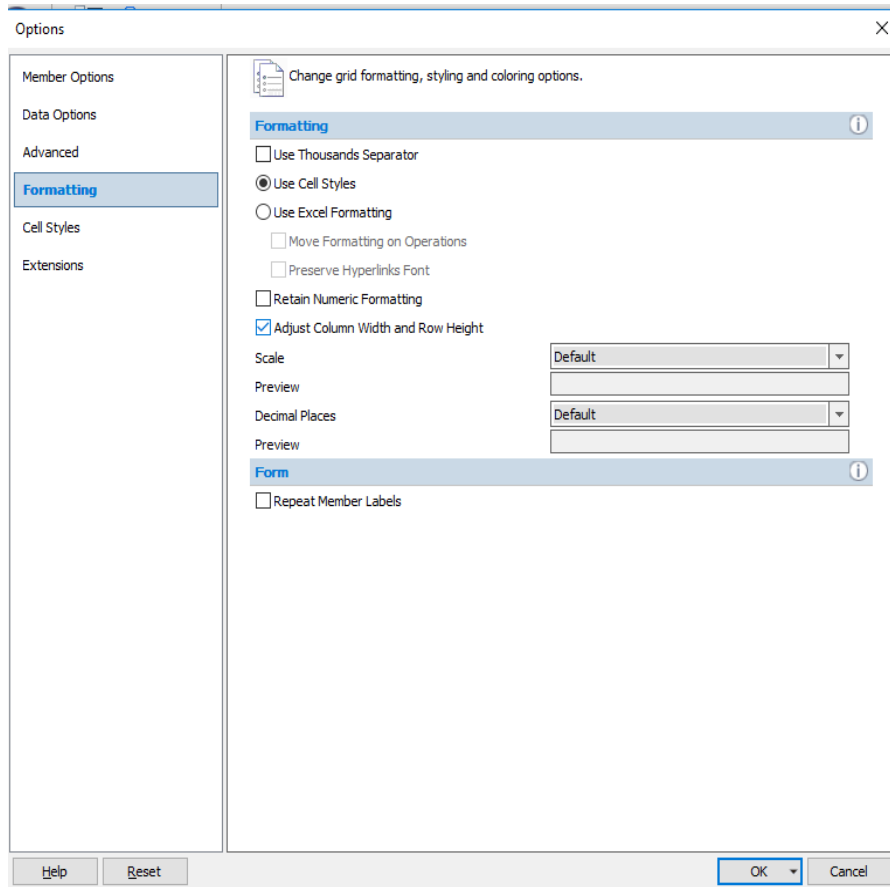


Still in the 'Options' box, click onto the 'Data Options' option on the left-hand side and clear the text from the '#NoData/Missing Label' field, leaving the field blank:

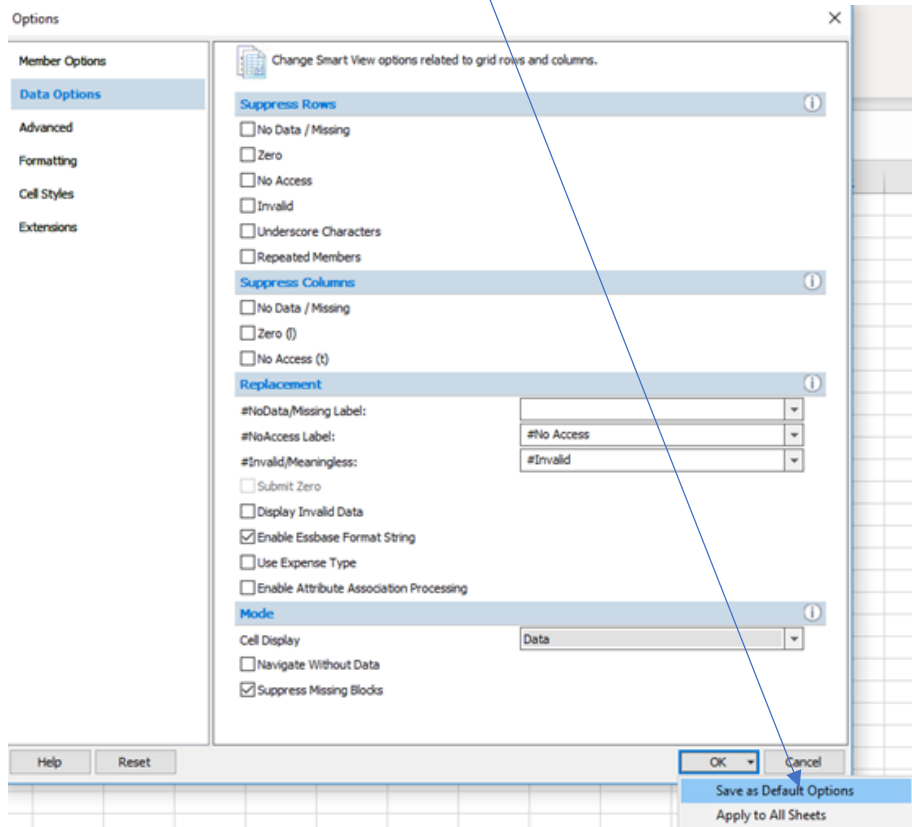
The screenshot shows the 'Options' dialog box with the 'Data Options' tab selected. The left-hand side has a tree view with 'Data Options' highlighted. The main area contains several sections: 'Suppress Rows' with checkboxes for 'No Data / Missing', 'Zero', 'No Access', 'Invalid', 'Underscore Characters', and 'Repeated Members'; 'Suppress Columns' with checkboxes for 'No Data / Missing', 'Zero (I)', and 'No Access (t)'; 'Replacement' with three dropdown menus for '#NoData/Missing Label:', '#NoAccess Label:', and '#Invalid/Meaningless:'. The first dropdown is currently empty, and a blue arrow points to it. Below these are checkboxes for 'Submit Zero', 'Display Invalid Data', 'Enable Essbase Format String' (checked), 'Use Expense Type', and 'Enable Attribute Association Processing'. The 'Mode' section has a 'Cell Display' dropdown set to 'Data' and checkboxes for 'Navigate Without Data' and 'Suppress Missing Blocks' (checked). At the bottom are 'Help', 'Reset', 'OK', and 'Cancel' buttons.

Again, still in the 'Options' box, move to the Formatting option on the left-hand side and tick the box next to 'Adjust Column Width and Row Height'. A tick mark should appear:



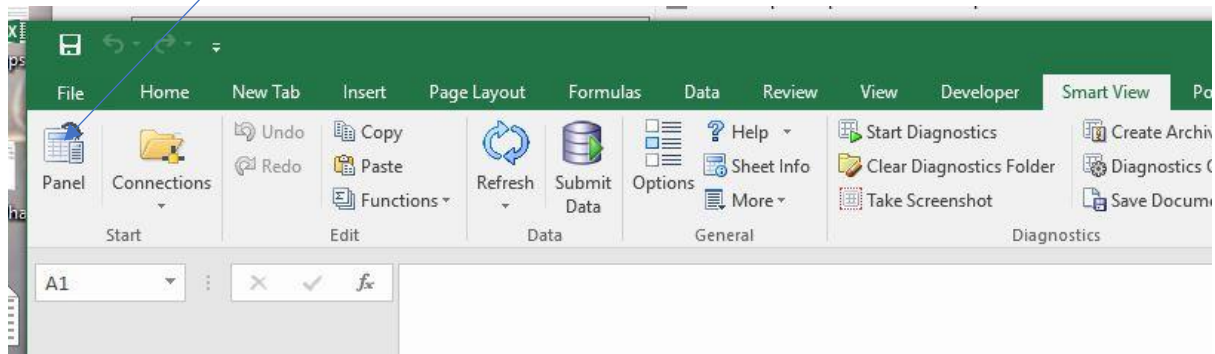


Save these settings as default options using the dropdown menu next to the 'OK' button at the bottom of the box and select 'Save as Default Options':

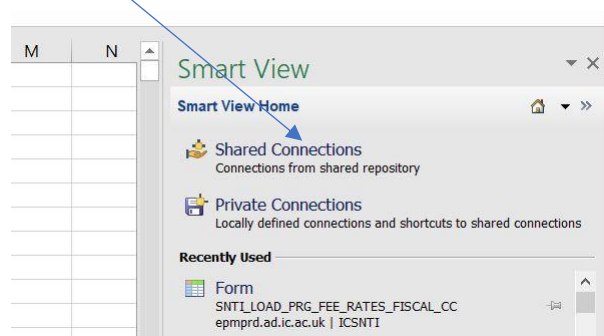


## Connect to Hyperion Planning

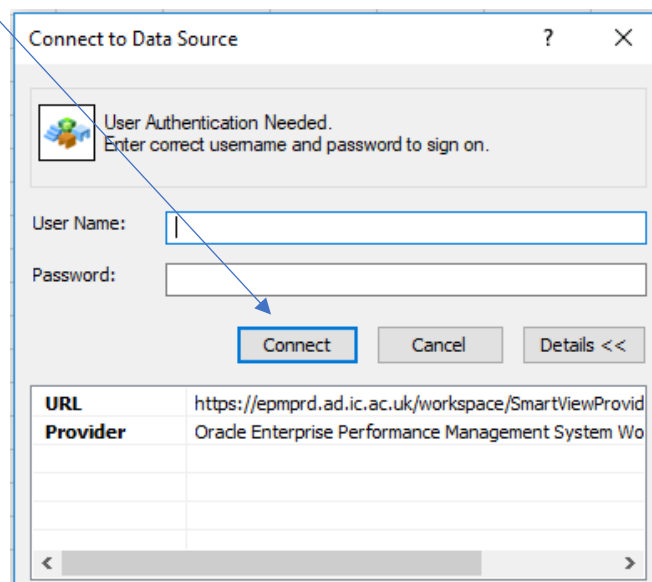
Click onto the Panel icon in the SmartView ribbon:



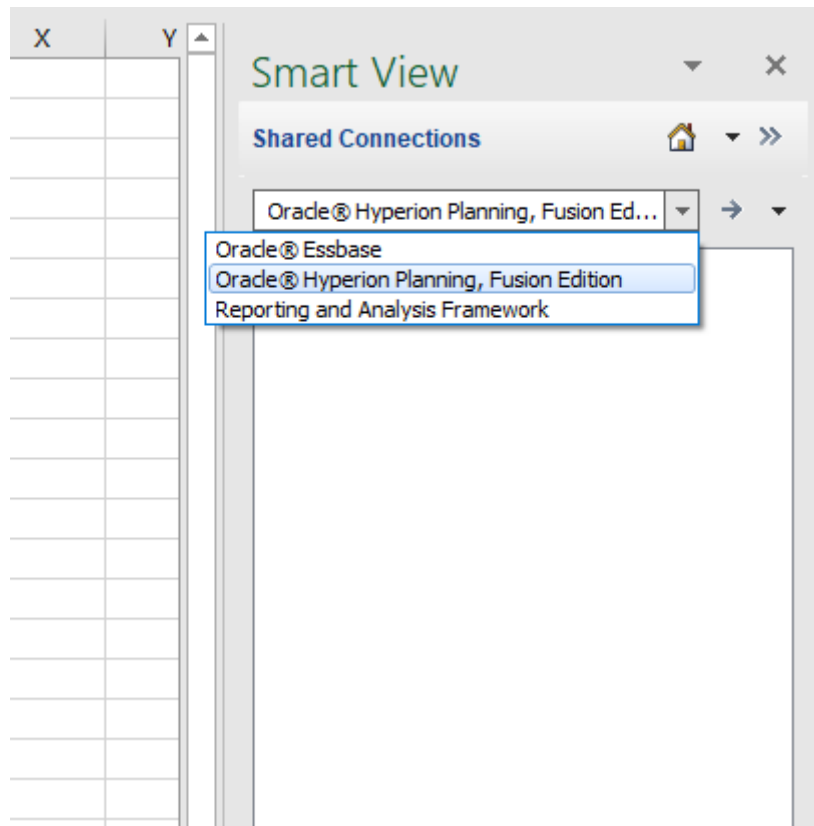
Then click onto 'Shared Connections':



The following box should appear on your screen. Enter your usual College username and password and then click 'Connect':



In the SmartView panel on the right-hand side, select 'Oracle® Hyperion Planning, Fusion Edition' from the drop-down menu:



You are now connected to Hyperion Planning.

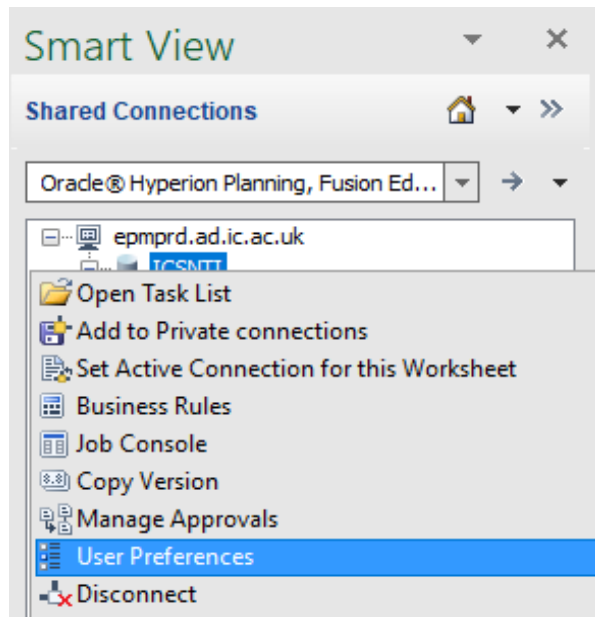
### Set user preferences

The first time you login into Hyperion Planning you will need to set your user preferences. The choices you make will affect how the information displays information to you so it is important to ensure this step has been completed.

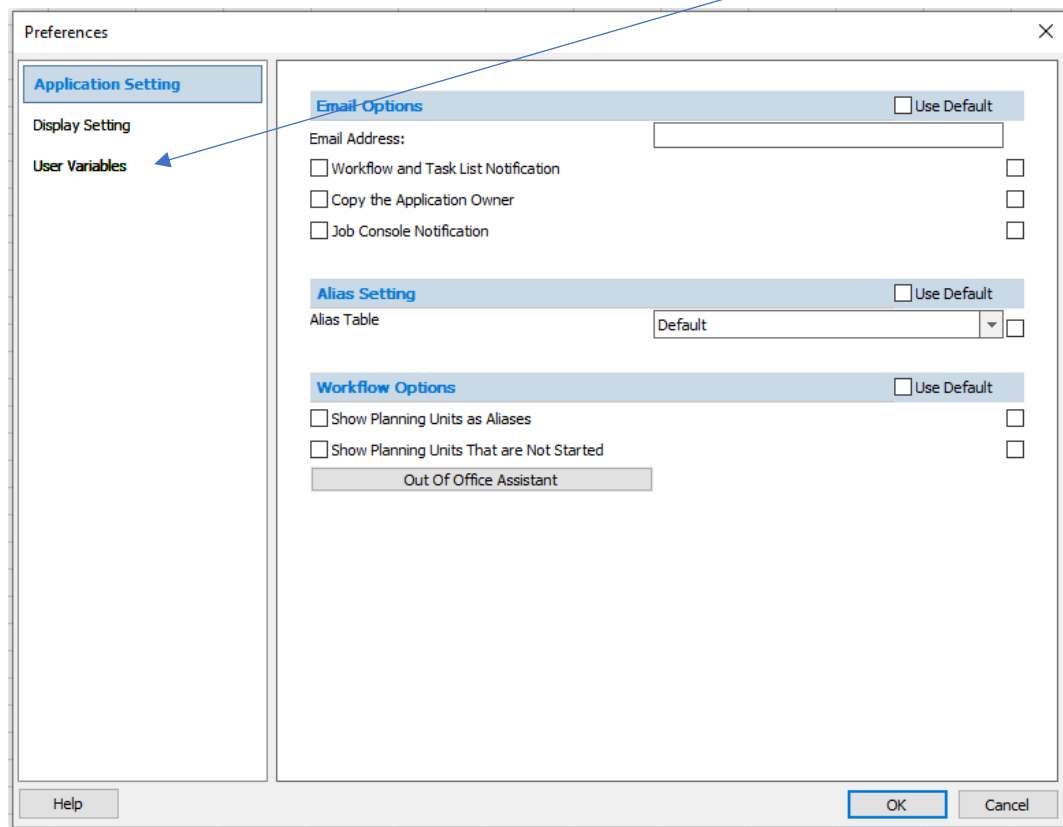
Open the Smart View panel and navigate to the application ICSNTI by expanding the tree list. Right click on ICSNTI to bring up the menu. Select the option “User Preferences”.







The user preferences screen will open. Navigate to the “User Variables” page.



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

Preferences

Application Setting

Display Setting

**User Variables**

**User Variable Options**

Dimension	User Variable Name	Selected Member
Version	Enter_Target_Version	Working
Scenario	Enter_Target_Scenario	Current Plan
Scenario	Enter_Source_Scenario	Current Plan
Version	Enter_Source_Version	Working
Programme	UserOrganisationProgramme	
Cost Centre	UserOrganisation	

Help OK Cancel

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:

Preferences

Application Setting

Display Setting

**User Variables**

**User Variable Options**

Dimension	User Variable Name	Selected Member
Version	Enter_Target_Version	Working
Scenario	Enter_Target_Scenario	Current Plan
Scenario	Enter_Source_Scenario	Current Plan
Version	Enter_Source_Version	Working
Programme	UserOrganisationProgram...	Your department programmes here
Cost Centre	UserOrganisation	Your department Name here

The example below is for a user in the Department of Aeronautics:

Preferences

Application Setting

Display Setting

User Variables

User Variable Options

Dimension	User Variable Name	Selected Member
Version	Enter_Target_Version	Working
Scenario	Enter_Target_Scenario	Current Plan
Scenario	Enter_Source_Scenario	Current Plan
Version	Enter_Source_Version	Working
Programme	UserOrganisationProgram...	Aeronautics programmes
Cost Centre	UserOrganisation	Aeronautics

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

## Student number and tuition fee income guidance for a Departmental user

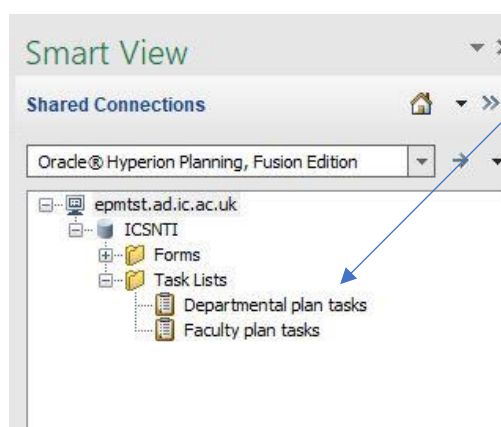
Please note that the screenshots below are from an administrator's point of view so will show all programmes; your user access will determine the programmes that you are able to view when you log in and should only be those you need to forecast or plan for.

### Department planning

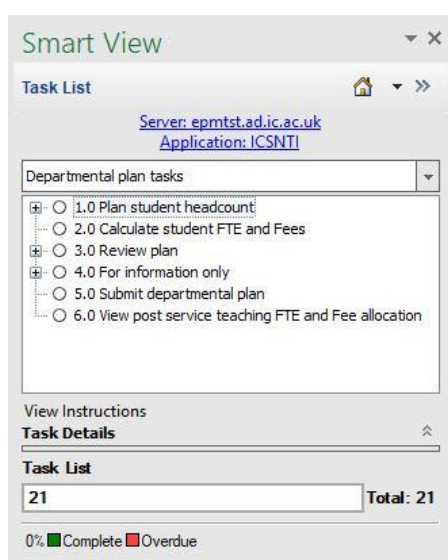
There are four activities that need to be carried out for Department planning: entering programme student headcount by financial year, running the calculations, reviewing and revising where necessary, and finally submitting the plan. Task lists within Hyperion Planning will sequentially guide you through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

Begin by logging in to Hyperion Planning as detailed on page 6 (from within the SmartView ribbon, open the Panel and using the Shared Connections option, connect to 'Oracle® Hyperion Planning, Fusion Edition'). If you have already set your user preferences, you will not need to do this again. Otherwise return to page 3 for guidance on how to set up your user preferences.

Expand the 'Task Lists' folder in the Panel by clicking the + sign next to it. Open the Departmental task lists by double clicking 'Departmental plan tasks':

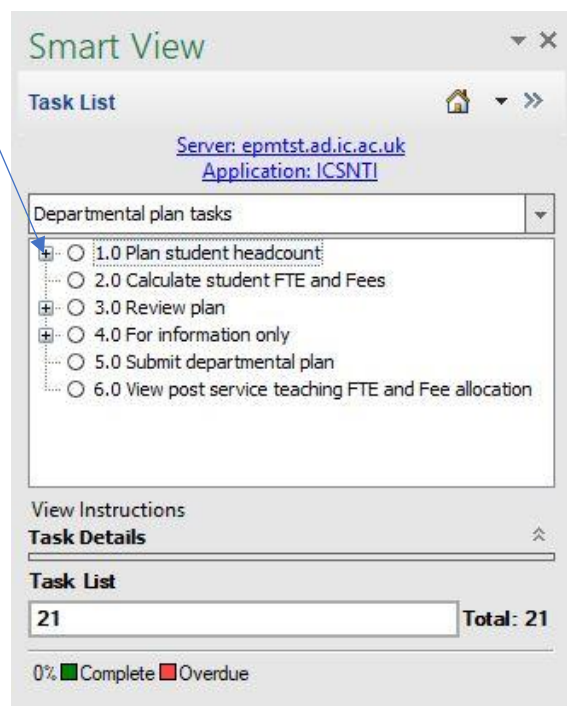


The following set of tasks will appear:



## 1.0 Plan Student Headcount

The first task in the list is to plan student headcount. To expand this task, click the + sign next to '1.0 Plan student headcount':



Smart View

Task List

Server: [epmtst.ad.ic.ac.uk](http://epmtst.ad.ic.ac.uk)  
Application: ICSNTI

Departmental plan tasks

- ☒ 1.0 Plan student headcount
- ☐ 2.0 Calculate student FTE and Fees
- ☒ 3.0 Review plan
- ☒ 4.0 For information only
- ☐ 5.0 Submit departmental plan
- ☐ 6.0 View post service teaching FTE and Fee allocation

View Instructions

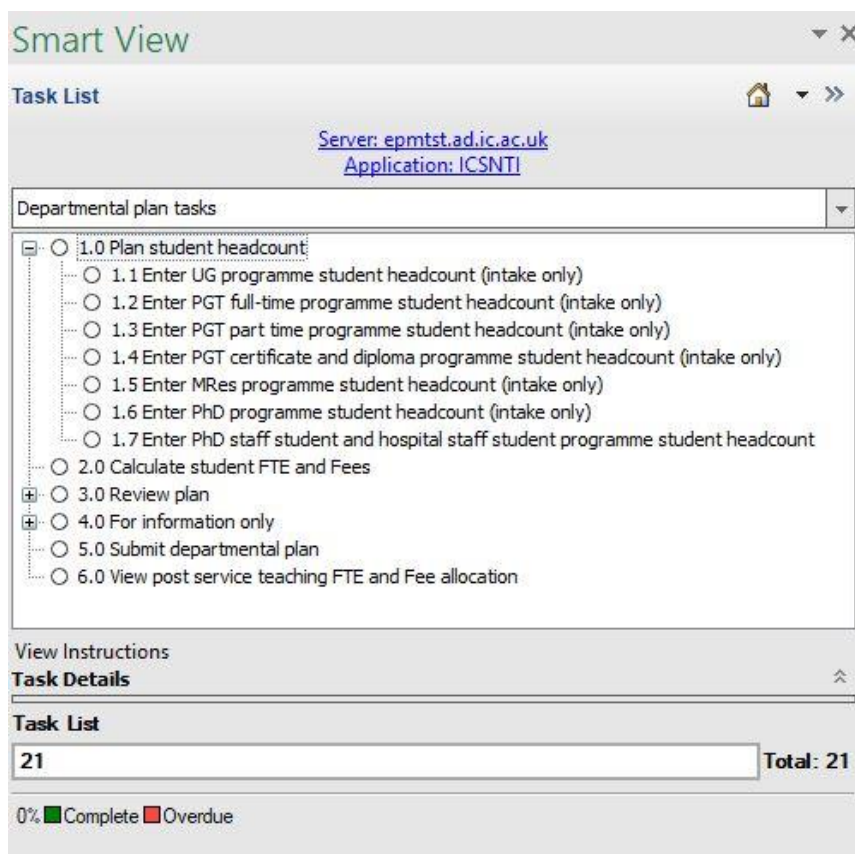
Task Details

Task List

21 Total: 21

0% ☒ Complete ☐ Overdue

The following further sub-tasks should appear:



Smart View

Task List

Server: [epmtst.ad.ic.ac.uk](http://epmtst.ad.ic.ac.uk)  
Application: ICSNTI

Departmental plan tasks

- ☒ 1.0 Plan student headcount
  - ☐ 1.1 Enter UG programme student headcount (intake only)
  - ☐ 1.2 Enter PGT full-time programme student headcount (intake only)
  - ☐ 1.3 Enter PGT part time programme student headcount (intake only)
  - ☐ 1.4 Enter PGT certificate and diploma programme student headcount (intake only)
  - ☐ 1.5 Enter MRes programme student headcount (intake only)
  - ☐ 1.6 Enter PhD programme student headcount (intake only)
  - ☐ 1.7 Enter PhD staff student and hospital staff student programme student headcount
- ☐ 2.0 Calculate student FTE and Fees
- ☒ 3.0 Review plan
- ☒ 4.0 For information only
- ☐ 5.0 Submit departmental plan
- ☐ 6.0 View post service teaching FTE and Fee allocation

View Instructions

Task Details

Task List

21 Total: 21

0% ☒ Complete ☐ Overdue

## Enter student headcount

The tasks within 1.0 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 you may not need to use all of these forms.

To open a form, double click on its name. This will populate the entire tab of your Excel document with the Hyperion Planning form. Most of the cells in the spreadsheet are greyed out; this means that they are read-only and cannot be edited. Each cell in every form will be either blue, grey, yellow or orange:

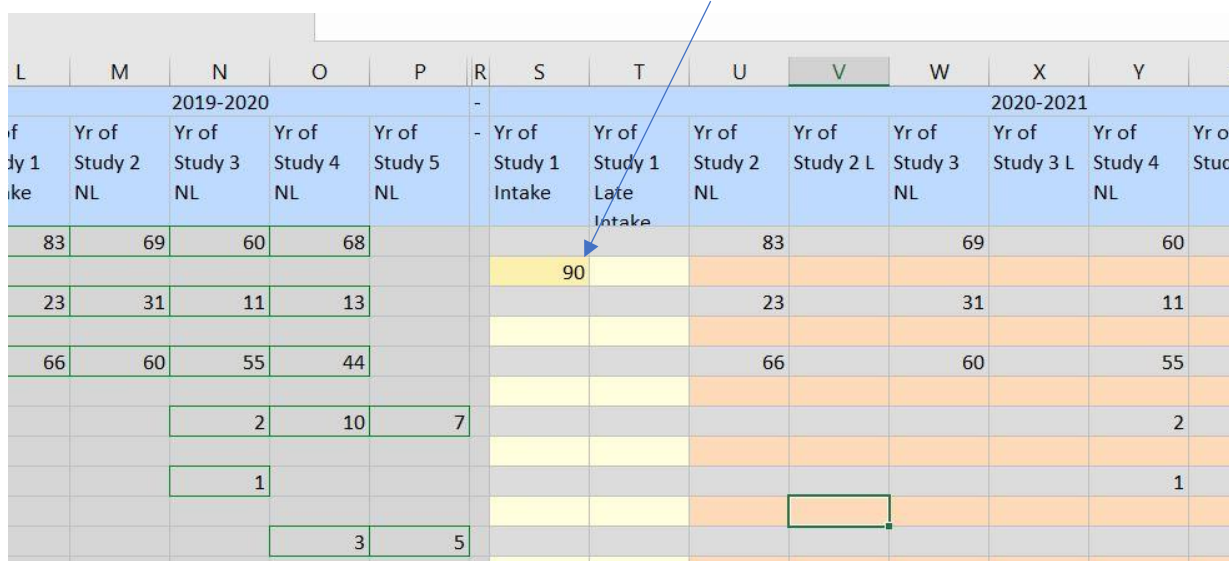
- **Blue cells** are the headings for each column and row, for example the name of a programme, or a year of study,
- **Grey cells** are read-only and cannot be edited, for example prior year actuals,
- **Yellow cells** are where you enter data for intake years,
- **Orange cells** are optional and are primarily for overriding data which has been calculated by the system, for example continuing student numbers, calculated using historic drop-out rates.

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 yellow 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:

				2019-2020								
				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 1 Late Intake	Yr of Study 2 NL	Yr of Study 2 L
H301 - Mechanical Engineering (MEng 4YFT)	Home	FT	Base student headcount	83	69	60	68					83
			Enter Student Headcount									
	European	FT	Base student headcount	23	31	11	13					23
			Enter Student Headcount									
H303 - Mechanical Engineering with a Year in Industry (MEng 5YFT)	Overseas	FT	Base student headcount	66	60	55	44					66
			Enter Student Headcount									
	Home	FT	Base student headcount			2	10	7				
			Enter Student Headcount				1					
	European	FT	Base student headcount									
			Enter Student Headcount									
	Overseas	FT	Base student headcount				3	5				
			Enter Student Headcount									

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, using historic drop-out rates, 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 light yellow to a darker yellow. This is to let you know that the cell has been edited:

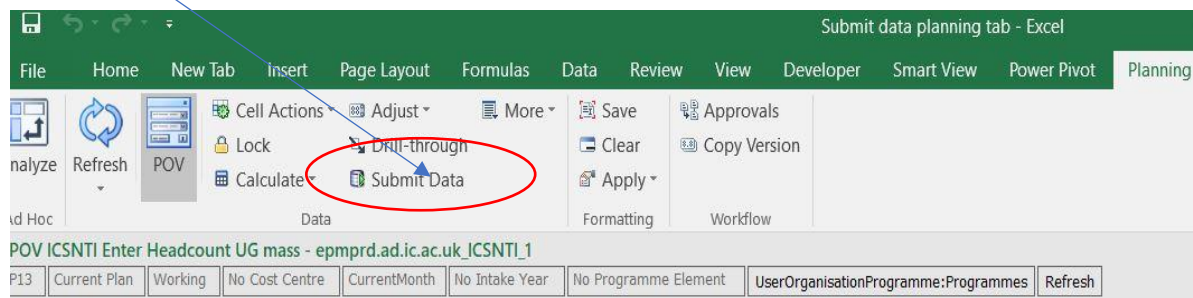


2019-2020					2020-2021							
Yr of Study 1 NL	Yr of Study 2 NL	Yr of Study 3 NL	Yr of Study 4 NL	Yr of Study 5 NL	Yr of Study 1 Intake	Yr of Study 1 Late Intake	Yr of Study 2 NL	Yr of Study 2 L NL	Yr of Study 3 NL	Yr of Study 3 L NL	Yr of Study 4 NL	Yr of Study 5 NL
83	69	60	68		90		83		69		60	
23	31	11	13				23		31		11	
66	60	55	44				66		60		55	
		2	10	7							2	
		1									1	
			3	5								

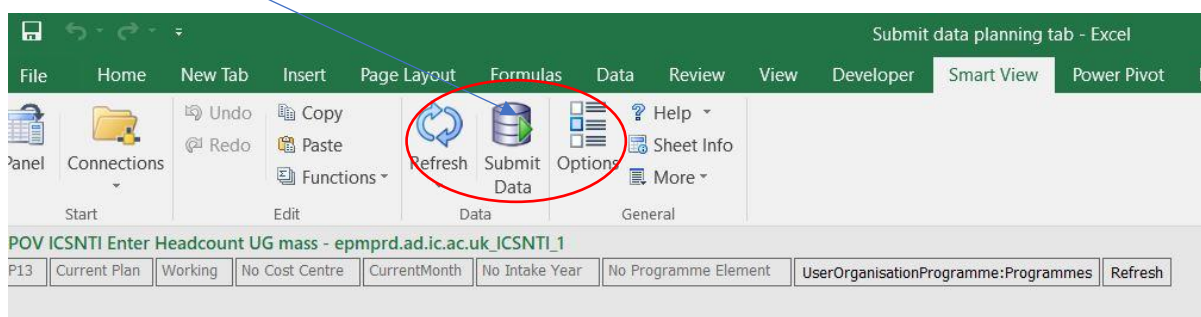
## Submit entered student headcount data

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. This can be done from either the SmartView tab or the Planning tab by clicking onto the 'Submit Data' icon.

Planning tab:

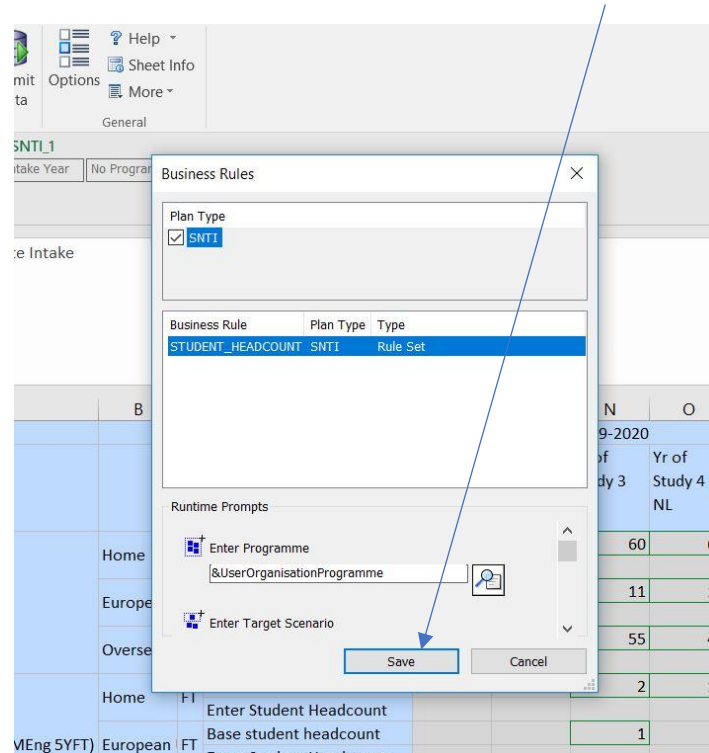


SmartView tab:

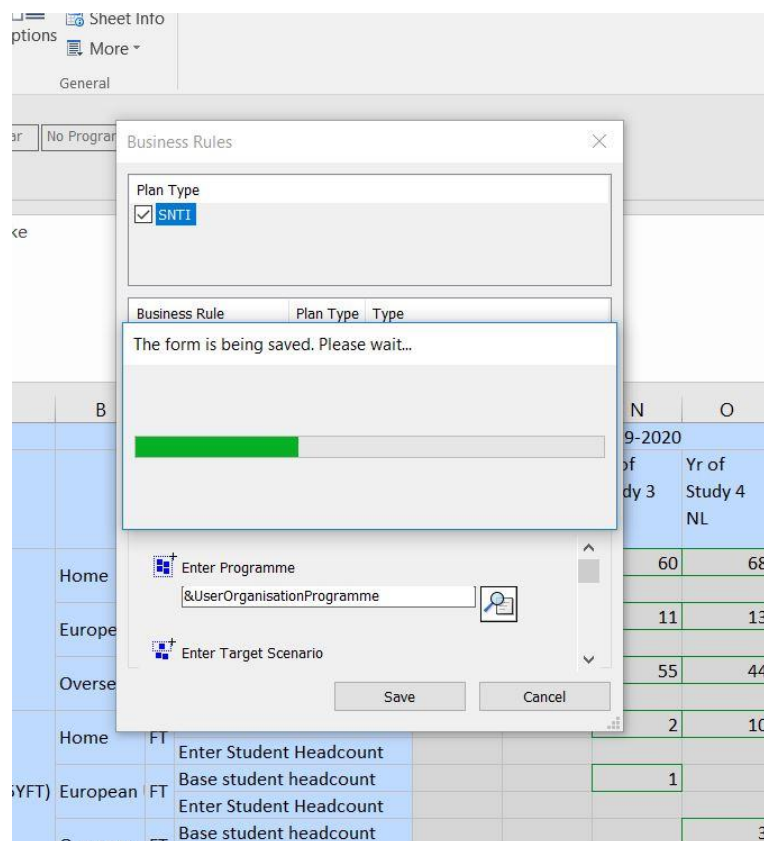




When you click 'Submit Data' this box will appear. Click on the 'Save' button to submit your data:

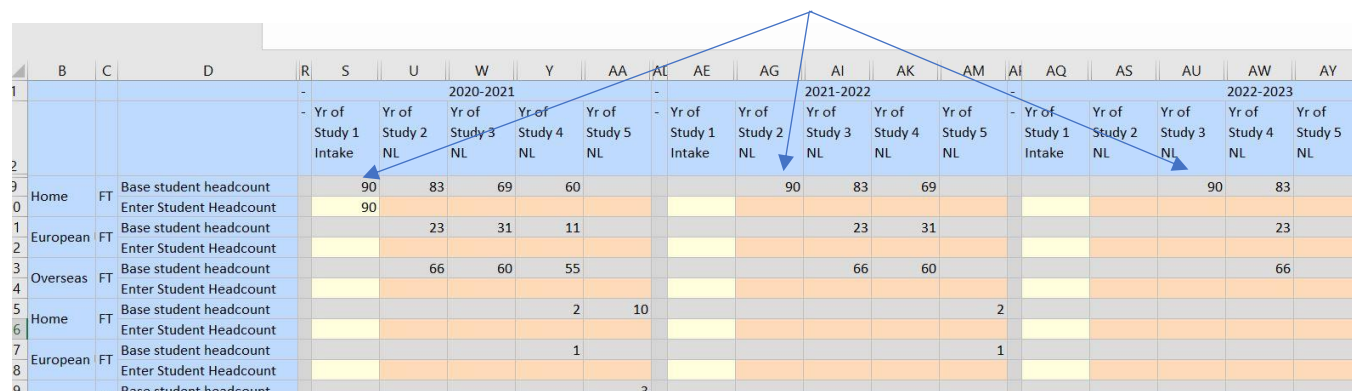


The headcount for the remaining programme years of study will be calculated from historical data and the data that you have just entered; once you have clicked the Save button, Hyperion Planning will launch the calculation and you will see the following:





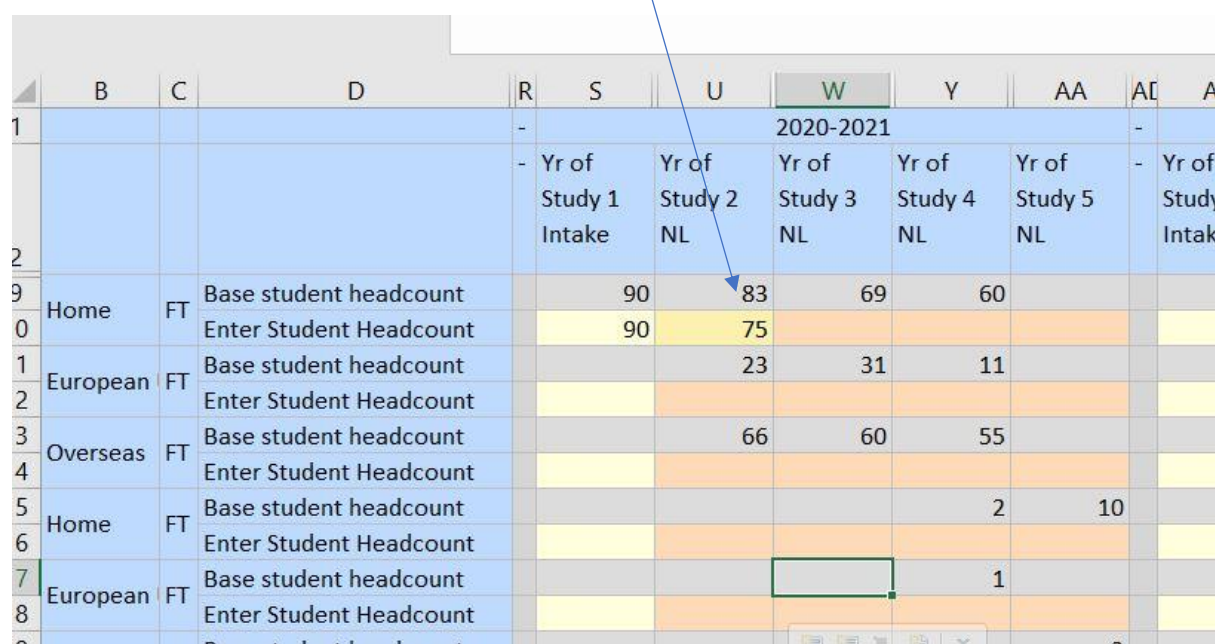
The 'Base student headcount' rows show the automatically calculated headcounts for continuing years as well as Year of Study 1 Intake once you have submitted your data:



	B	C	D	R	S	U	W	Y	AA	AL	AE	AG	AI	AK	AM	AL	AQ	AS	AU	AW	AY
1				-			2020-2021														
				-	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
9	Home	FT	Base student headcount		90	83	69	60					90	83	69					90	83
0			Enter Student Headcount		90																
1	European	FT	Base student headcount			23	31	11					23	31							23
2			Enter Student Headcount																		
3	Overseas	FT	Base student headcount			66	60	55					66	60							66
4			Enter Student Headcount																		
5	Home	FT	Base student headcount					2	10						2						
6			Enter Student Headcount																		
7	European	FT	Base student headcount					1							1						
8			Enter Student Headcount																		
9	Overseas	FT	Base student headcount						3												

## Override automatically calculated continuing student headcount

As mentioned above, 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:



	B	C	D	R	S	U	W	Y	AA	AL	A
1				-			2020-2021				
				-	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 Intake
9	Home	FT	Base student headcount		90	83	69	60			
0			Enter Student Headcount		90	75					
1	European	FT	Base student headcount			23	31	11			
2			Enter Student Headcount								
3	Overseas	FT	Base student headcount			66	60	55			
4			Enter Student Headcount								
5	Home	FT	Base student headcount					2	10		
6			Enter Student Headcount								
7	European	FT	Base student headcount					1			
8			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.

	B	C	D	R	S	U	W	Y	AA	AC
1				-			2020-2021			-
				-	Yr of Study	Yr of Study	Yr of Study	Yr of Study	Yr of Study	-
2										
9	Home	FT	Base student headcount		90	75	69	60		
0			Enter Student Headcount		90	75				
1	European	FT	Base student headcount			23	31	11		
2			Enter Student Headcount							
3	Overseas	FT	Base student headcount			66	60	55		
4			Enter Student Headcount							
5	Home	FT	Base student headcount					2	10	
6			Enter Student Headcount							
7	European	FT	Base student headcount					1		

Once you have finished this task, click 'Mark Complete' at the bottom of the panel on the right-hand side to show that the task has been completed:

☐ 1.4 Enter PGF certificate and diploma programme student headcount  
☐ 1.5 Enter MRes programme student headcount (intake  
☐ 1.6 Enter PhD programme student headcount (intake  
☐ 1.7 Enter PhD staff student and hospital staff student

**Task Details**  
**Task List**  
 **Total**  
 0% ☒ Complete ☐ Overdue

The circle to the left of the task name will turn green and the task name is struck out. If you need to go back to re-do the task you can click 'Mark Incomplete' to remind you what is finished and which tasks are still to be carried out.

Smart View

Task List

Server: [epmiprd.ad.ic.ac.uk](http://epmiprd.ad.ic.ac.uk)  
Application: ICSNTI

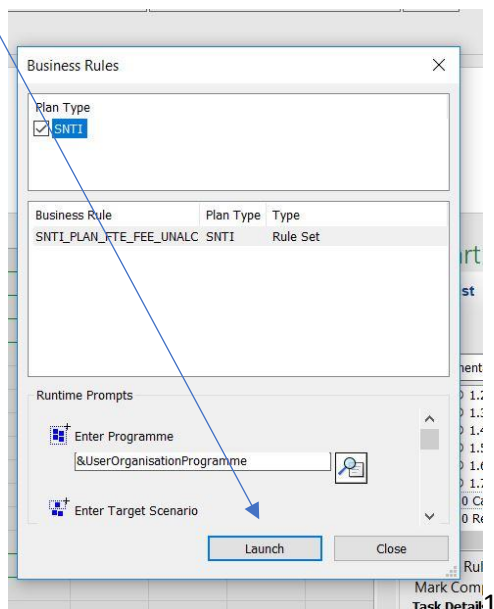
Departmental plan tasks

- ☒ 1.0 Plan student headcount
- ☒ 2.0 Calculate student FTE and Fees
- ☐ 3.0 Review plan
- ☐ 4.0 For information only
- ☐ 6.0 View post service teaching FTE and Fee alloc

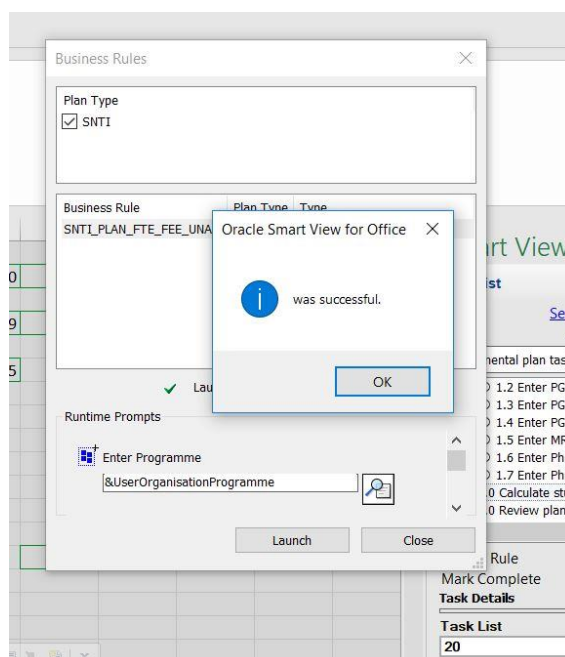
**Task Details**  
**Task List**  
☒ 10 ☐ 10 **Total: 20**  
 50% ☒ Complete ☐ Overdue

## 2.0 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 right-hand side of the spreadsheet. 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

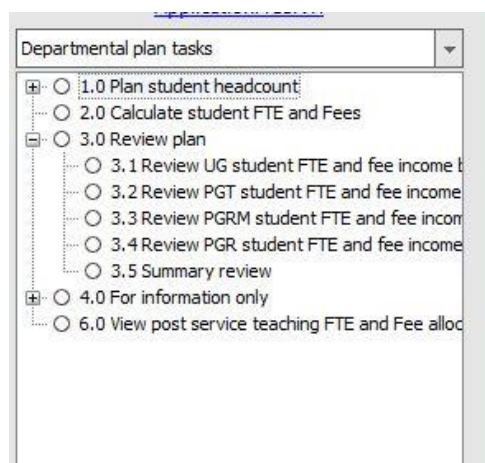
Allocated student FTE = student FTE x teaching proportion

Allocated Fee = student fee x teaching proportion

Once you have finished this task, click 'Mark Complete' at the bottom of the panel to show that the task has been completed as you did after entering the headcount data and submitting it (page 14).

### 3.0 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 undergraduate headcounts in the previous example above:

	A	B	C	D	V	W	AO	AP	BH
				-	2020-2021	-	2021-2022	-	2022-2023
				-	+Total Programme Year of Study	-	+Total Programme Year of Study	-	+Total Programme Year of Study
	H301 - Mechanical Engineering (MEng 4YFT)	Home	Student FTEs		294		329		360
		European Union	Student FTEs		90		109		113
		Overseas	Student FTEs		251		271		291
		Total Residency	Student FTEs		635		709		764
7	--	--	--						
8									
9	H301 - Mechanical Engineering (MEng 4YFT)	Home	Student Fees		832,500		878,750		925,000
10		European Union	Student Fees		231,250		277,500		323,750
11		Overseas	Student Fees		2,222,500				
12	-	-	-						
13		Home	Total student Fees		832,500		878,750		925,000
14		European Union	Total student Fees		231,250		277,500		323,750
15	All UG Programmes	Overseas	Total student Fees		2,222,500				
16		Total residency	Total student Fees		3,286,250		1,156,250		1,248,750

Some of the columns showing the individual programme years of study are hidden; you can unhide them if you want to check the FTEs and fees by year of study. To unhide rows, double click on the + sign within the cell, for example next to "+ Total Programme Year of Study".

### 4.0 For information only

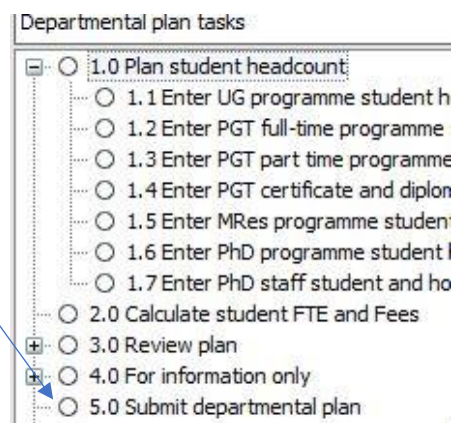
Task 4.0 includes further review forms where you can view programme fee rates, dropout rates and teaching proportions. These are for information only and therefore read-only. The example below shows the fee rates for the programme above:

[illegible]

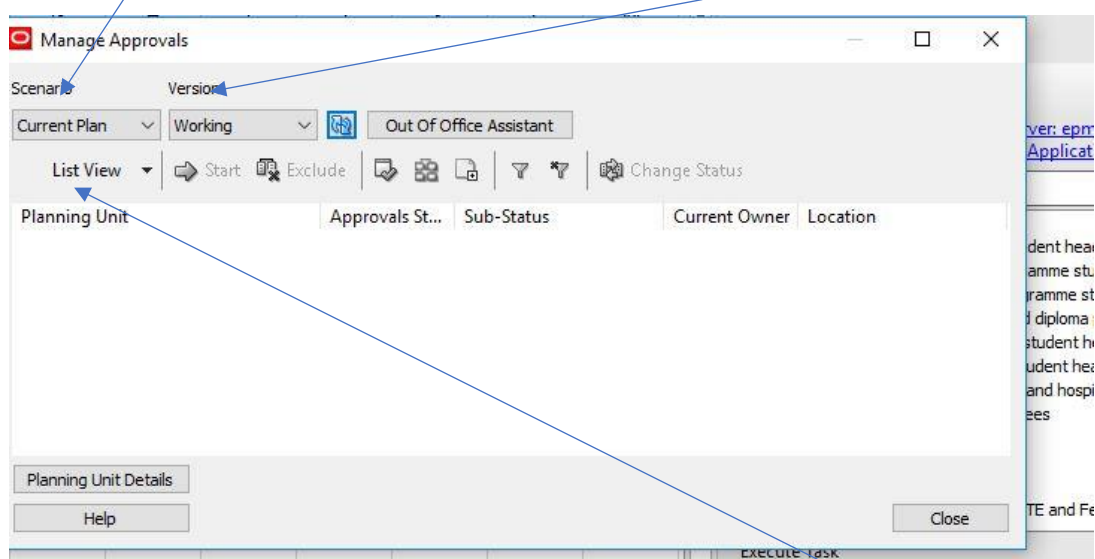
## Submit Plan

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.

Plans are submitted via a process called 'Manage Approvals'. To submit your Plan go to task 5.0 in the task list: \



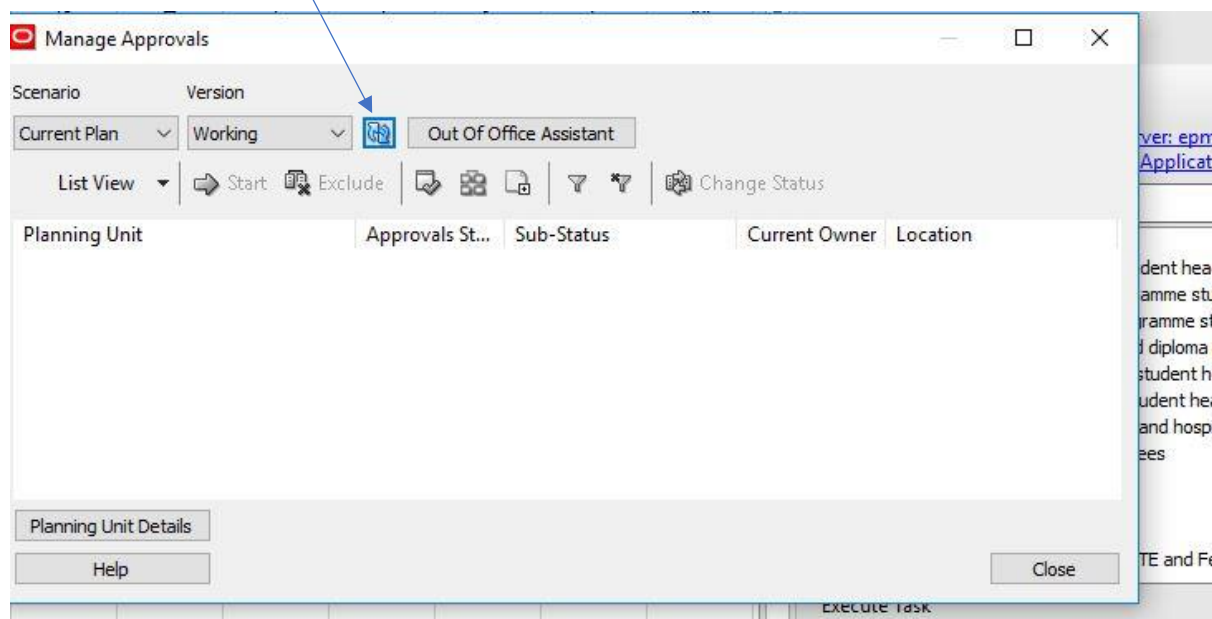
Double click on 'Submit Plan'. A new box called 'Manage Approvals' will appear as below. Make sure that the Scenario is set to 'Current Plan' and that the Version is 'Working':



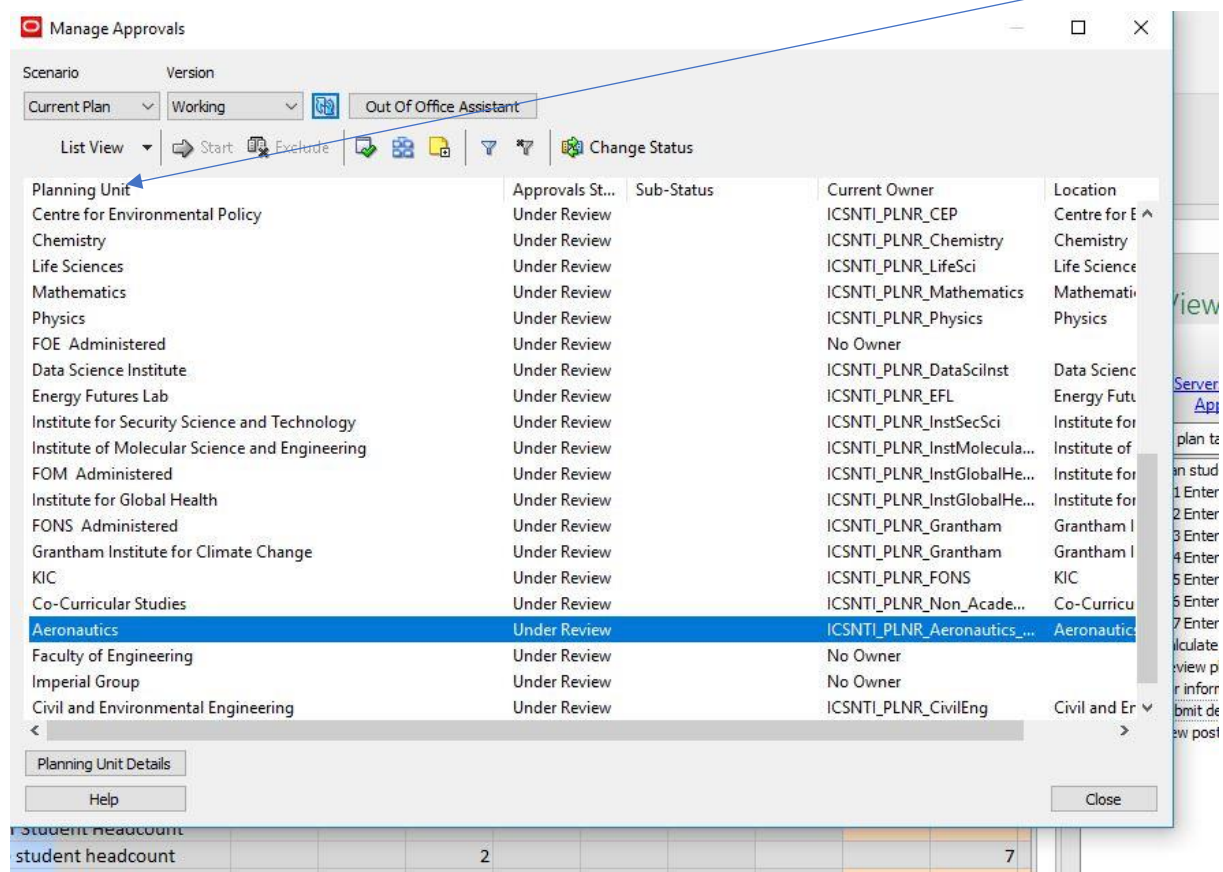
Ensure that the drop-down menu in the left-hand corner of the box is set to 'List View'.



Click the 'Refresh' icon:

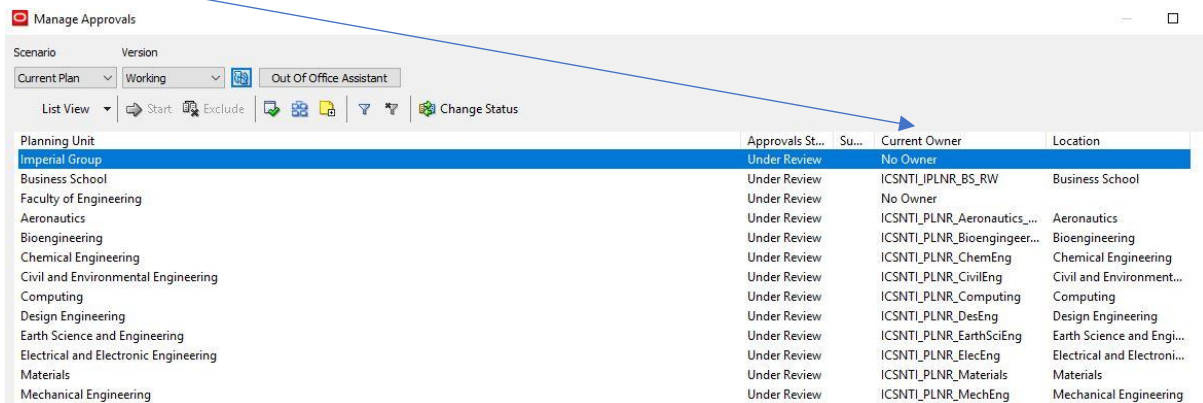


You should then see a list of Planning units. Each Department and Faculty has its own Planning unit:

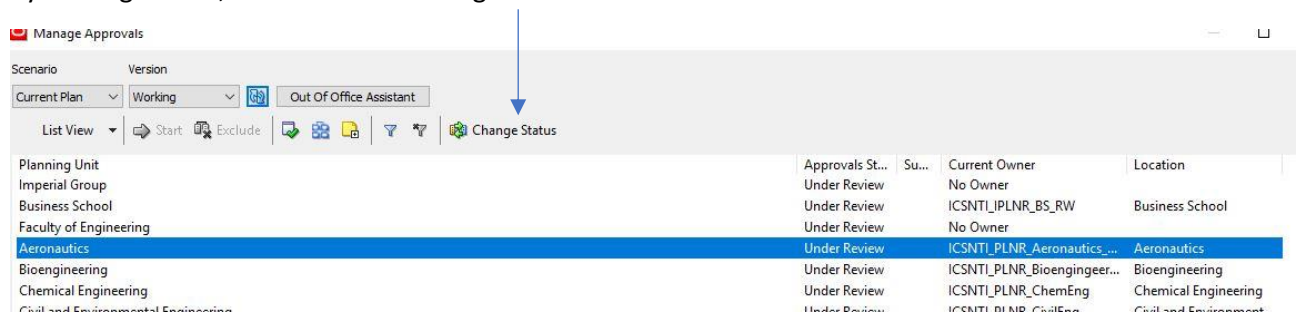


As the Department Planner, you have been set up in Hyperion Planning to belong to a user group called ICSNTI\_PLNR\_YourDepartmentName. For example for Mechanical Engineering this is ICSNTI\_PLNR\_MechEng.

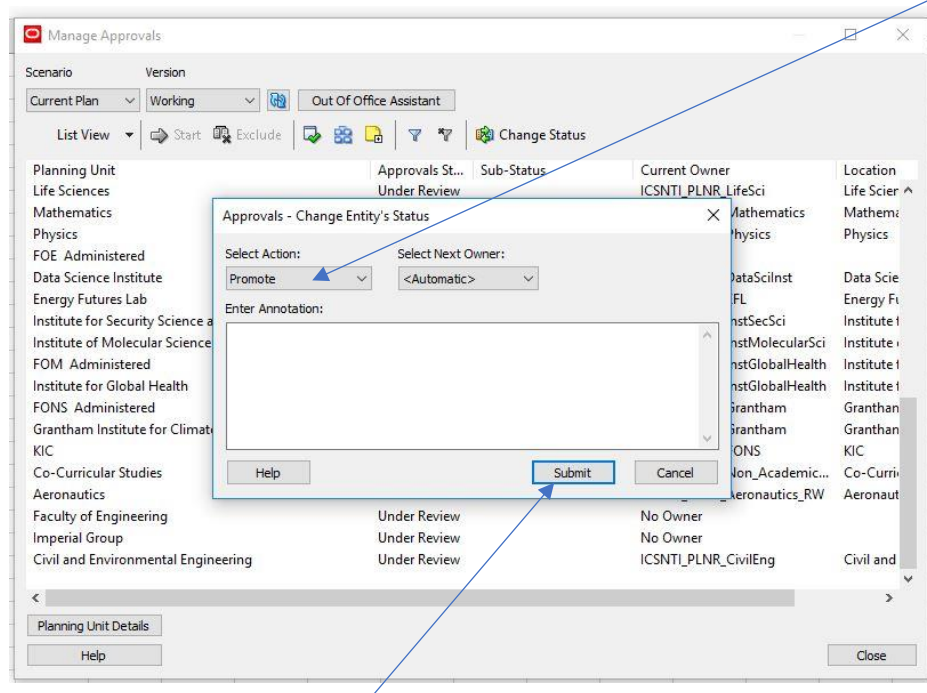
At the start of the planning process, your department's Planning unit is owned by your departmental user group, of which you are a member.



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 'Change Status':



Another new box will open. Make sure that the 'Select Action' drop-down menu is set to 'Promote'.

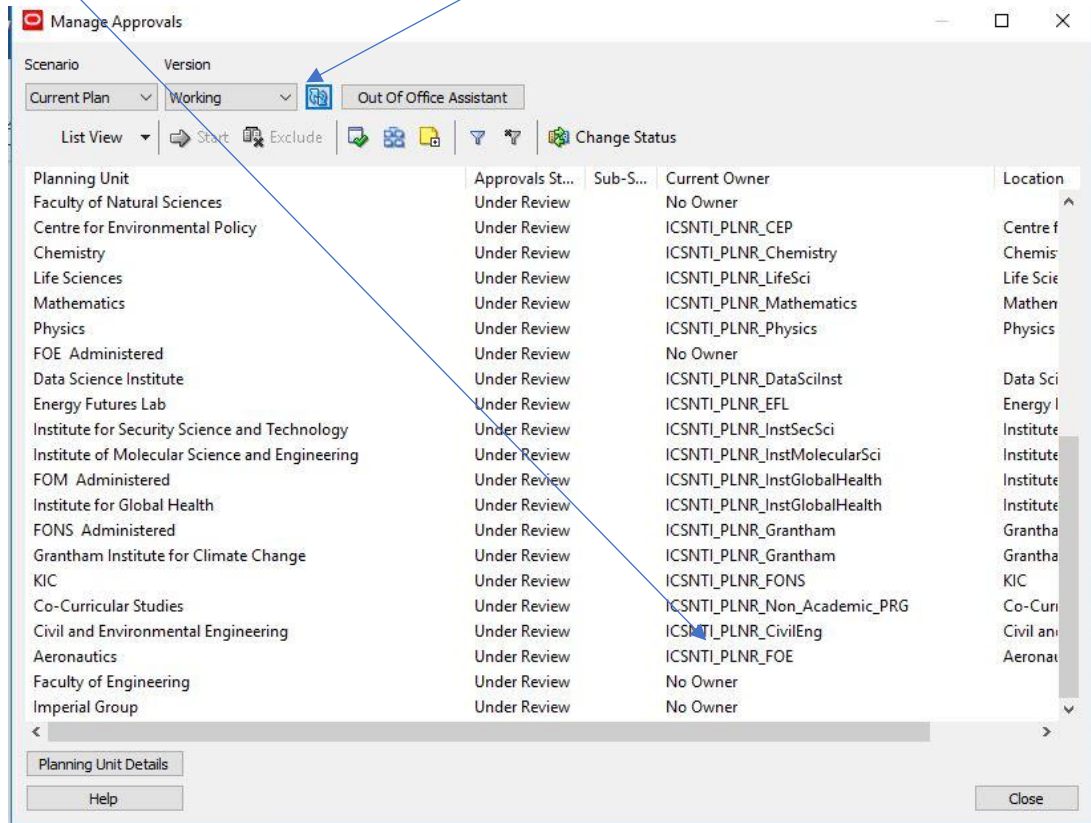


Then click the 'Submit' button at the bottom.

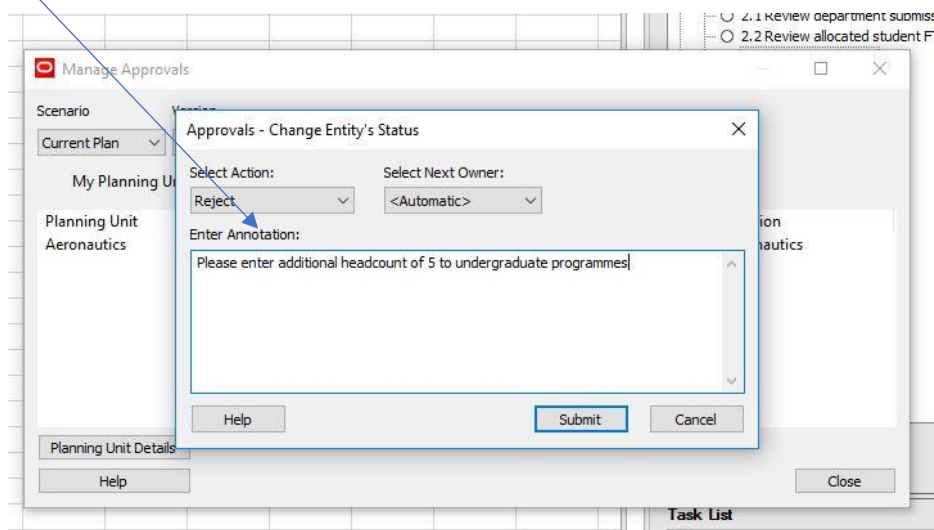
Once you have submitted your Plan it cannot be modified by you or the approver.

Once you have finished this task, click 'Mark Complete' at the bottom of the panel 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 refreshing the 'Manage Approvals' window. Your department Planning unit will have moved and the ownership will have changed to your Faculty user group:



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 by your Faculty Finance Officer. The request should appear in the 'Enter Annotations' window:





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

## Student number and tuition fee income guidance for a Faculty user

### Faculty planning

Log in to Hyperion Planning following the steps on page 6. There are three main tasks for Faculty planners to complete: setting programme fee rates, reviewing Departmental Plan submissions and either approving or rejecting back to the Department, and finally submitting the Plan to Financial Planning and Analysis. The fourth task is to review Fee and FTE rates, teaching proportions and submitted headcount.

### Faculty plan task list

### 1.0 Update programme fee rates

To enter programme fee rates, double click on the 'Update programme fee rates' task to open the data entry form, which looks like this (for ease of viewing only a few selected programmes are shown):

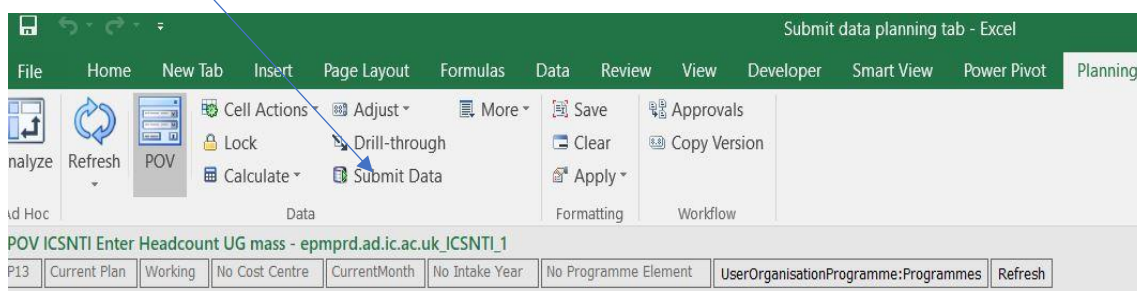
	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		FY18			FY19			FY20			FY21			FY22		
2		Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas
3	-															
5	Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
6	Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
7	Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
8	Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
9	Programme Fees Override	9250.00	9250.00	30250.00	9250.00	9250.00	30250.00									
10	Programme Fees Override	9250.00	9250.00	30250.00	9250.00	9250.00	30250.00									

Two prior years of fee rates are shown in greyed out cells for your reference. Enter the fee rates for the Year 1 Intake students only for the three Plan years in the yellow cells for each year of the Plan and each residency.

The cells that you have entered data into will turn a darker yellow to indicate that they have been edited:

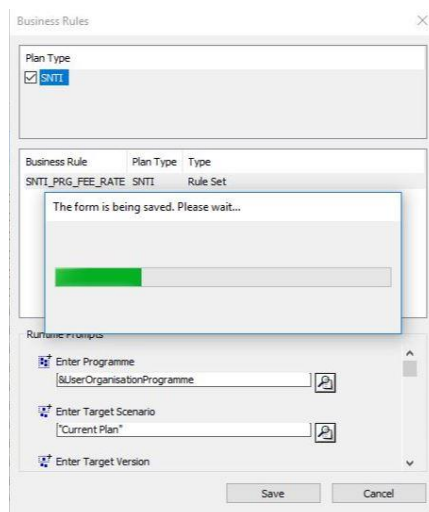
	FY18			FY19			FY20			FY21			FY22		
	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00									
Programme Fees Override	9250.00	9250.00	30250.00	9250.00	9250.00	30250.00									
Programme Fees Override	9250.00	9250.00	30250.00	9250.00	9250.00	30250.00									

Click 'Submit Data' to upload the fee rates to Hyperion Planning. This can be done from either the Planning tab as shown below or from the SmartView tab (demonstrated on page 12):



Clicking on the 'Submit Data' icon brings up a box that allows you to launch a business rule to calculate the future year fee rates based on historical prior year rates, the fee inflation rate set by Financial Planning and Analysis, and the fee rate caps for Home and EU students. Do this by clicking the 'Save' button at the bottom of the box:

Once the 'Save' button has been clicked you will see the following:



The cells that you have entered data into will revert to the paler yellow colour once the data has been submitted:

	FY18			FY19			FY20			FY21			FY22		
	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						
Programme Fees Override	9250.00	9250.00	29000.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						
Programme Fees Override	9250.00	9250.00	30250.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						
Programme Fees Override	9250.00	9250.00	30250.00	9250.00	9250.00	30250.00	9250.00	9250.00	30750.00						

To show that the task has been completed, click on the task name and then 'Mark complete' at the bottom of the task list:

Smart View

Task List

Server: [epmtst.ad.ic.ac.uk](http://epmtst.ad.ic.ac.uk)  
Application: ICSNTI

Faculty plan tasks

- ☒ 1.0 Update programme fee rates
- ☐ 2.0 Review department plan submissions
- ☐ 3.0 Submit Faculty plan
- ☒ 4.0 For information

Open Form  
Mark Complete

Task Details

Task List

18 Total: 18

0% ☒ Complete ☐ Overdue

The task will now become scored out and the button at the side of the task name will become green:

Smart View

Task List

Server: [epmtst.ad.ic.ac.uk](http://epmtst.ad.ic.ac.uk)  
Application: ICSNTI

Faculty plan tasks

- ☒ 1.0 Update programme fee rates
- ☐ 2.0 Review department plan submissions
- ☐ 3.0 Submit Faculty plan
- ☒ 4.0 For information

Open Form  
Mark Incomplete

Task Details

Task List

16 Total: 17

5% ☒ Complete ☐ Overdue

The process now passes to the individual Departments who will enter their planned student headcounts and run the business rules to calculate the Plan years FTEs and fees based on their headcount entries and your fee rates. 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 (future years of study are calculated as per above)

Allocated student FTE = student FTE x teaching proportion

Allocated Fee = student Fee x teaching proportion

## 2.0 Review Department Plan submissions

Open the next task and review the Departmental Plan submissions. These are read-only forms; you cannot edit the submission in any way. If you are happy with the output, approve the submission. If not, reject it back to the Department for amendments. An example review form is shown below:

POV ICSNTI Review Headcount Submission UG mass - epmpred.ad.ic.ac.uk\_ICSNTI\_1

P13

Current Plan

Working

No Cost Centre

CurrentMonth

No Intake Year

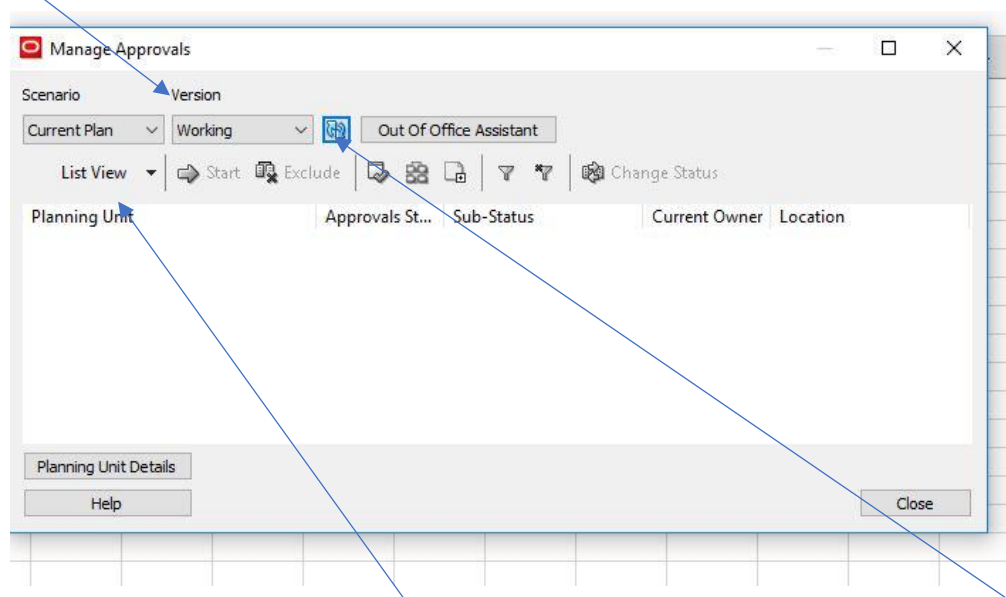
No Programme Element

UserOrganisationProgramme:Programmes

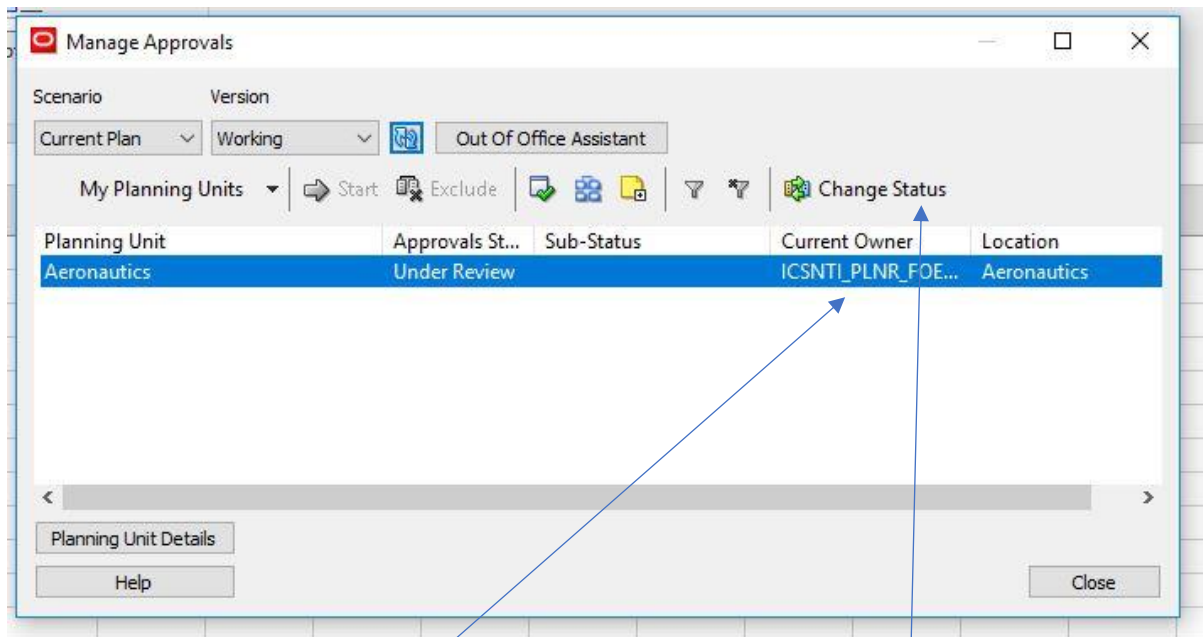
Refresh

A129

If you are not happy with a Department's Plan and want them to make amendments to it, reject the Plan back to the Department. Otherwise, approve it. To do this, click onto task 2.3 'Manage approvals' and the following box will pop up. Ensure that the Scenario is set to 'Current Plan' and the Version to 'Working':



Click on the drop down menu called 'List View' and select 'My Planning Units'. Then hit the refresh icon. You will see all of the Departments in your Faculty that have submitted their plans to you for review and approval. In this example, it is only the Department of Aeronautics as shown below:



Notice that once the Department submitted the plan to you for approval, ownership has changed from the Department to the Faculty. Faculty-level planners are:

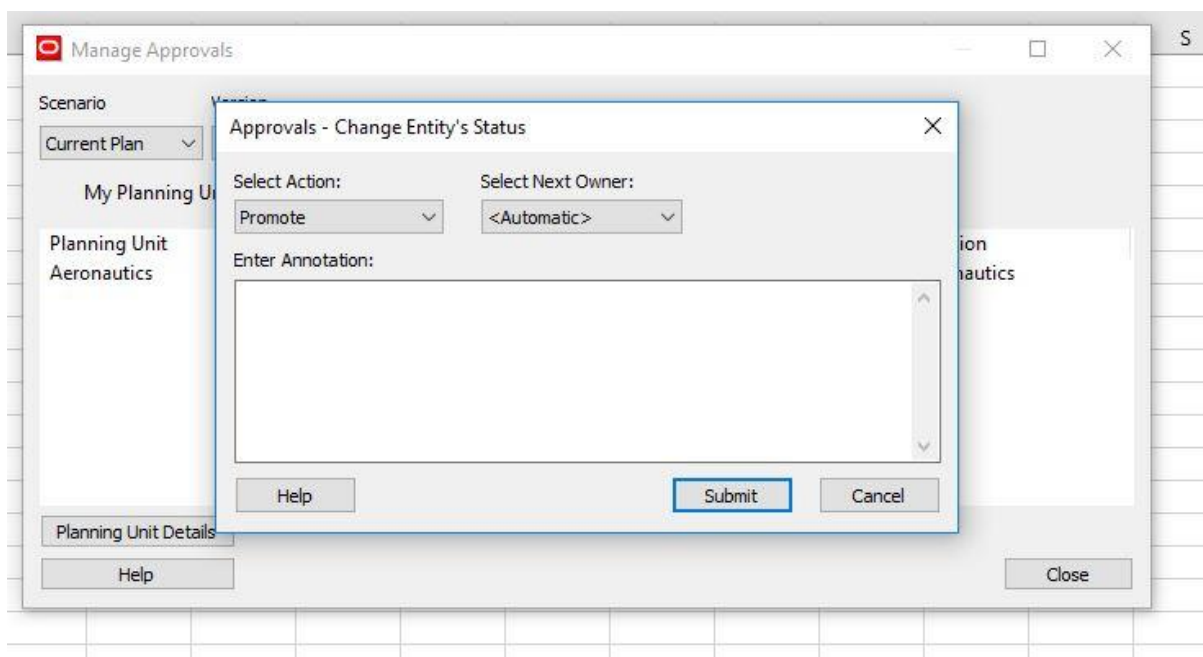
ICSNTI\_PLNR\_BS for the Business School

ICSNTI\_PLNR\_FOE for the Faculty of Engineering

ICSNTI\_PLNR\_FOM for the Faculty of Medicine

ICSNTI\_PLNR\_FONS for the Faculty of Natural Sciences.

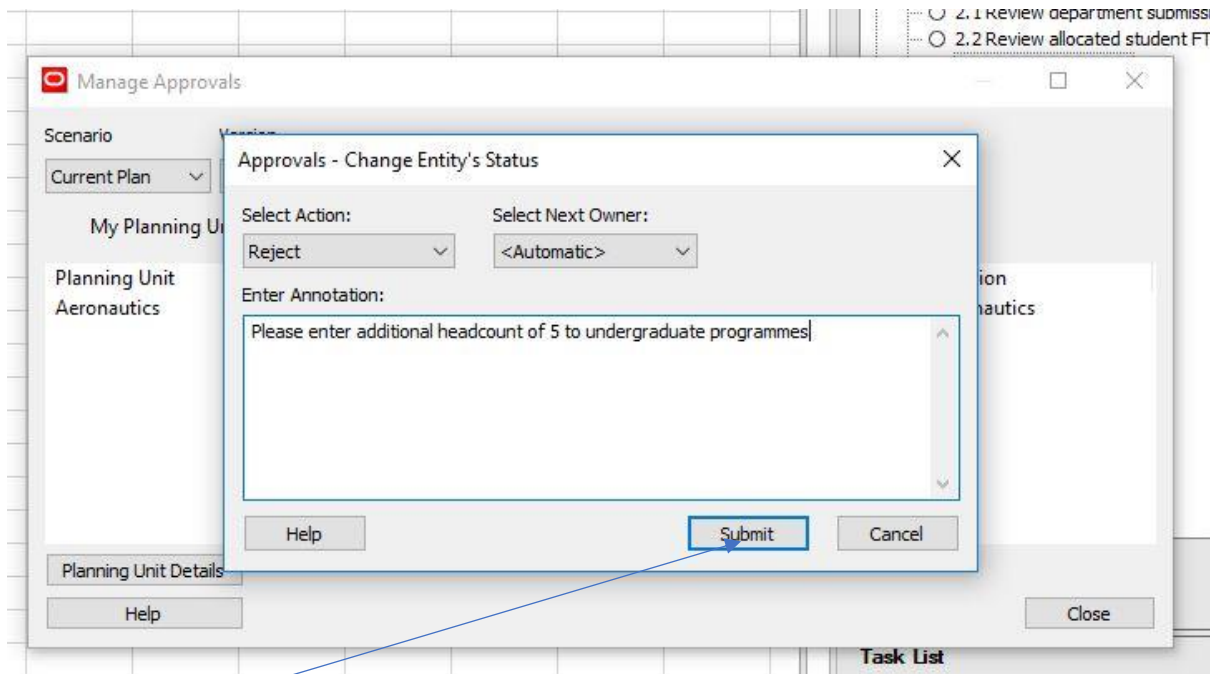
To approve the plan, click on 'Aeronautics' then on to the 'Change Status' bar at the top of the box. Another box will open that looks like this:



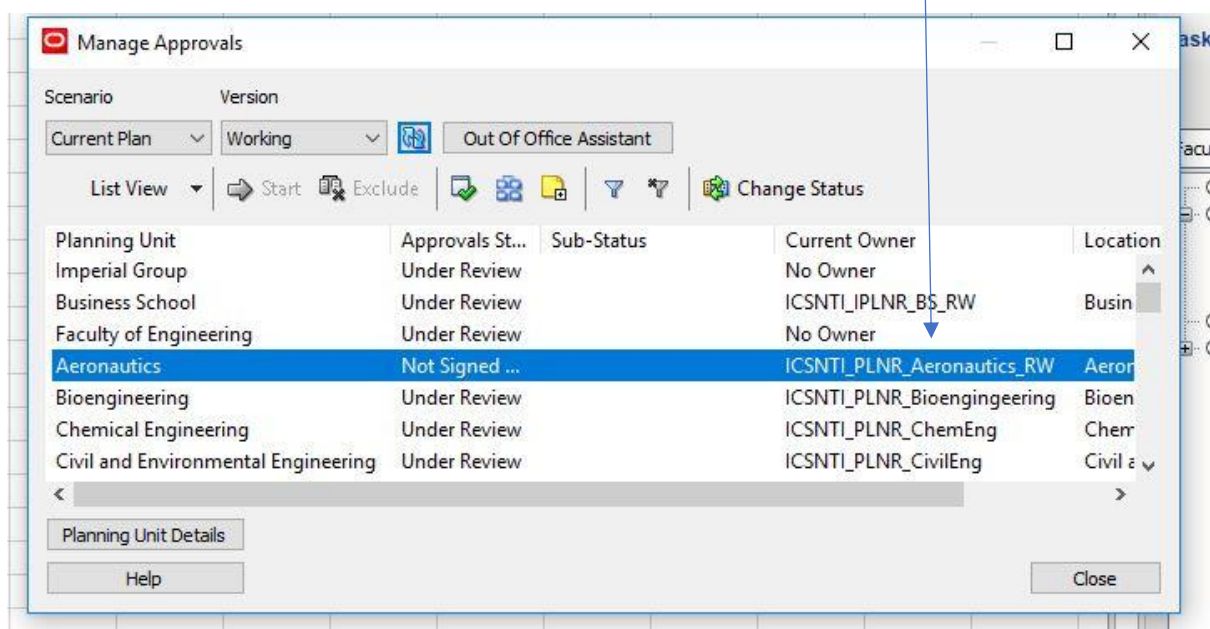


Use the 'Select Action' drop-down menu to choose whether to approve or reject the plan. To approve, choose 'Promote' as shown above (you may wish to wait until all of your Departments have submitted their plans before promoting them all at the same time to Financial Planning and Analysis).

To reject the plan back to the Department, select 'Reject' from the drop-down menu. There is a box for entering any comments to help the Department revise their plan:

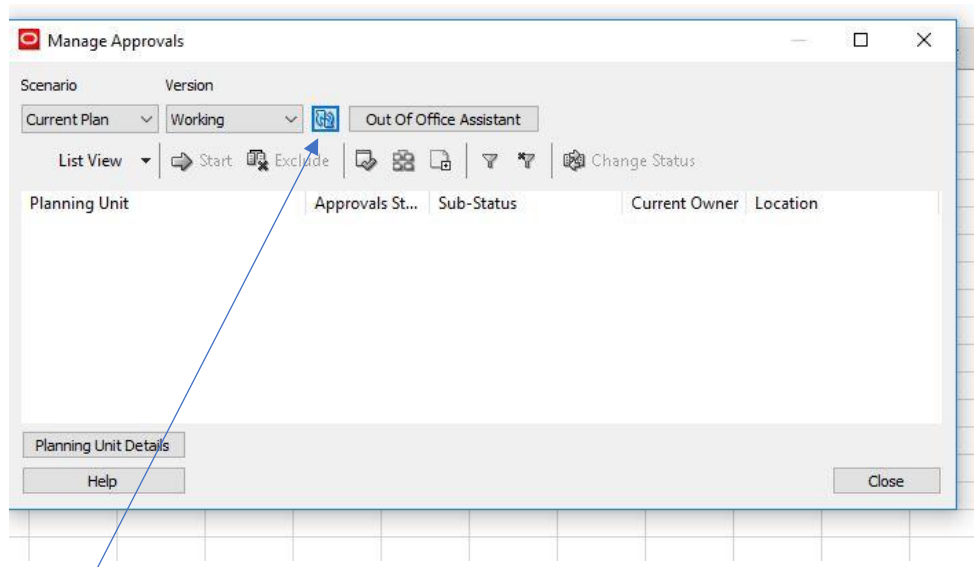


Then click 'Submit'. The ownership of the plan will revert back to the Aeronautics Department:

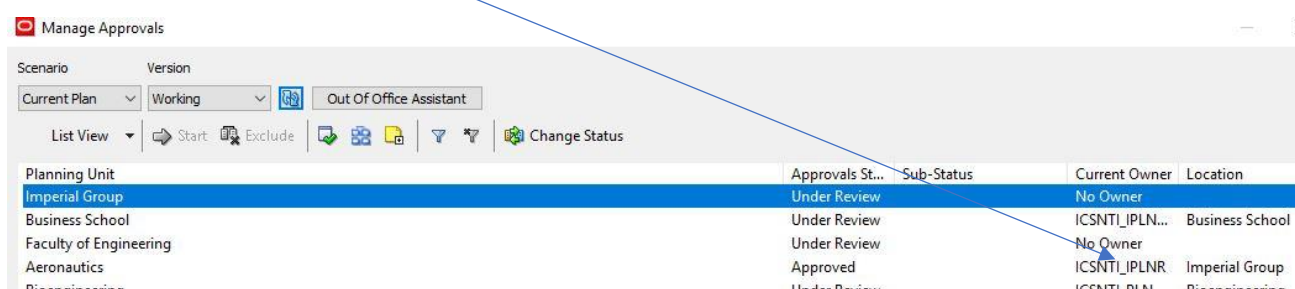


### 3.0 Submit Plan

When you are satisfied with the Department and Faculty-associated Institute Plans, submit them to Financial Planning and Analysis. Click onto 'Submit Faculty plan' and again the Manage Approvals box will appear:



Click on the Refresh icon and then select the Departments that you want to promote onwards to the Financial Planning and Analysis team. Use the 'Change Status' button again and select 'Promote'. Ownership will then move to the FP&A team:



## 4.0 For Information

The next task is simply a number of forms that you can review if you wish to. It covers FTE and Fee rates, teaching proportions and submitted headcount. As these forms are for information only they are read-only and cannot be edited. The example below shows the fee rates that have been calculated for future years of study:

PUV view all programme fee rates by financial year - epmpd.ac.ic.ac.uk/ICSNTI\_I

Programme Fees (Annual) Current Plan UserOrganisationProgramme-Programmes Refresh

		2019-2020			2020-2021			2021-2022			2022-2023		
		Home	European	Overseas	Home	European	Overseas	Home	European	Overseas	Home	European	Overseas
Undergraduate Programmes													
H301 - Mechanical Engineering (MEng 4YFT)	Programme Year of Study 1 Intake	9,250	9,250	30,250	9,250	9,250	30,750	9,250	9,250	31,250	9,250	9,250	32,000
	Programme Year of Study 2 Non-Late	9,250	9,250	30,000	9,250	9,250	30,750	9,250	9,250	31,250	9,250	9,250	32,000
	Programme Year of Study 3 Non-Late	9,250	9,250	29,500	9,250	9,250	30,750	9,250	9,250	31,250	9,250	9,250	32,000
	Programme Year of Study 4 Non-Late	9,250	9,250	29,500	9,250	9,250	30,250	9,250	9,250	31,250	9,250	9,250	32,000
	Programme Year of Study 1 Intake	9,250	9,250	30,250	9,250	9,250	30,750	9,250	9,250	31,250	9,250	9,250	32,000

## Further Assistance

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

Catherine Cunningham (FP&A Manager): [c.cunningham@imperial.ac.uk](mailto:c.cunningham@imperial.ac.uk)

Andrew Stagg (Head of FP&A): [a.m.stagg@imperial.ac.uk](mailto:a.m.stagg@imperial.ac.uk)

## 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