

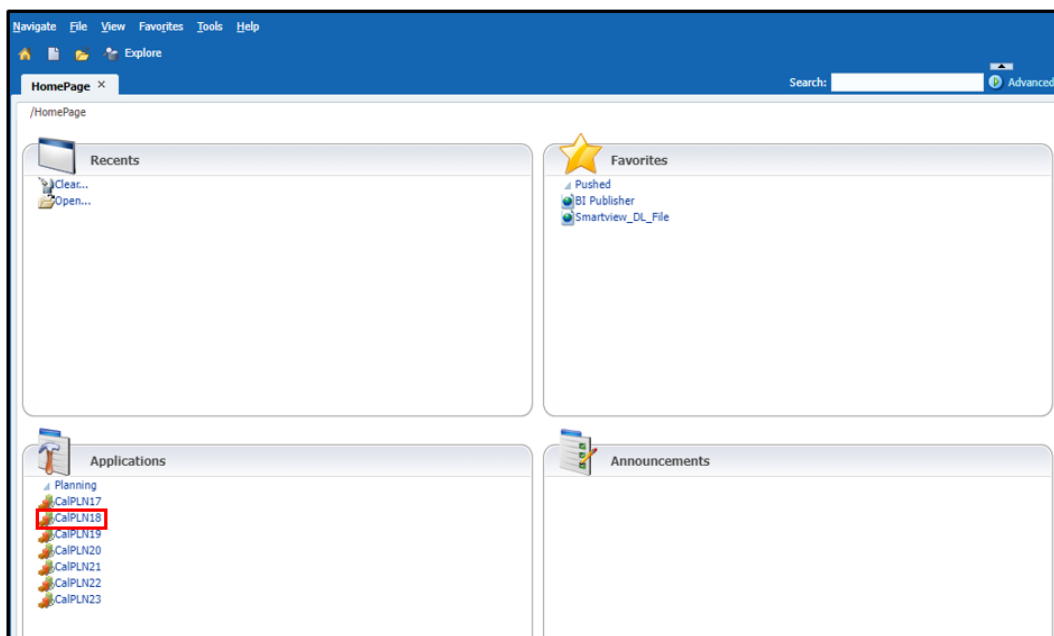
# How to Clear Data in a Budget Request and How to Delete a Budget Request in Hyperion By Department of Finance

**Target Audience:** All Department budget analysts with access to the Hyperion Planning Application.

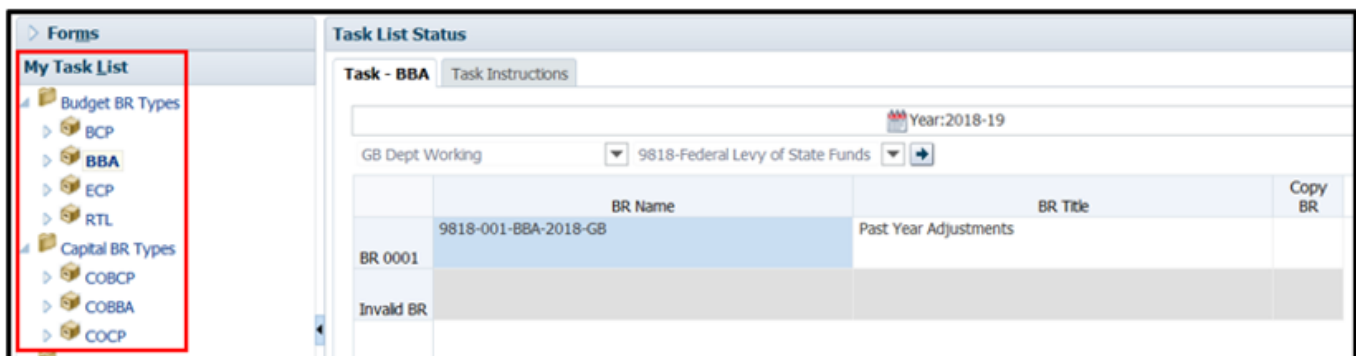
**Purpose:** Provide instructions to: (1) delete data (dollars and positions/Full-Time Equivalents [FTEs] information) in a Budget Request (BR) and (2) delete a BR container.

**Step 1:** On the Hyperion Homepage, under the Applications section, click on the **CalPLNXX** button. A new tab will open.

'XX' represents the first part of the fiscal year. In this example we are in the development of the 2018-19 budget cycle, therefore we will choose CalPLN18.



**Step 2:** Navigate to **My Task List** → Select the **Budget BR Type** or **Capital BR Type**. In the drop-down list, select the desired BR type. In the following example, **BBA** was selected.



**Step 3:** Select the point of view (POV)—**Version** and **BU** from the drop down lists.

**Task List Status**

Task - BBA Task Instructions

GB Dept Working 9818-Federal Levy of State Funds

**Page Dimension**

Member

Member

- GB Dept Working
- GB Dept Submitted
- GB Dept What-If
- GB Exchange
- GB Public
- GB Public Initials
- AR Dept Working
- AR Dept Submitted
- AR Exchange
- AR Public
- MR Dept Working
- MR Dept Submitted
- MR Exchange

**Task - BBA** Task Instructions

Year: 2018-19

GB Dept Working 9818-Federal Levy of State Funds

**Page Dimension**

Member

Member

- 9818-Federal Levy of State Funds

BR	BR Name
BR 0001	9818-001-BBA-2018-GB
Invalid BR	

**Step 4:** Click the “GO” arrow to proceed

**Task - BBA** Task Instructions

Year: 2018-19

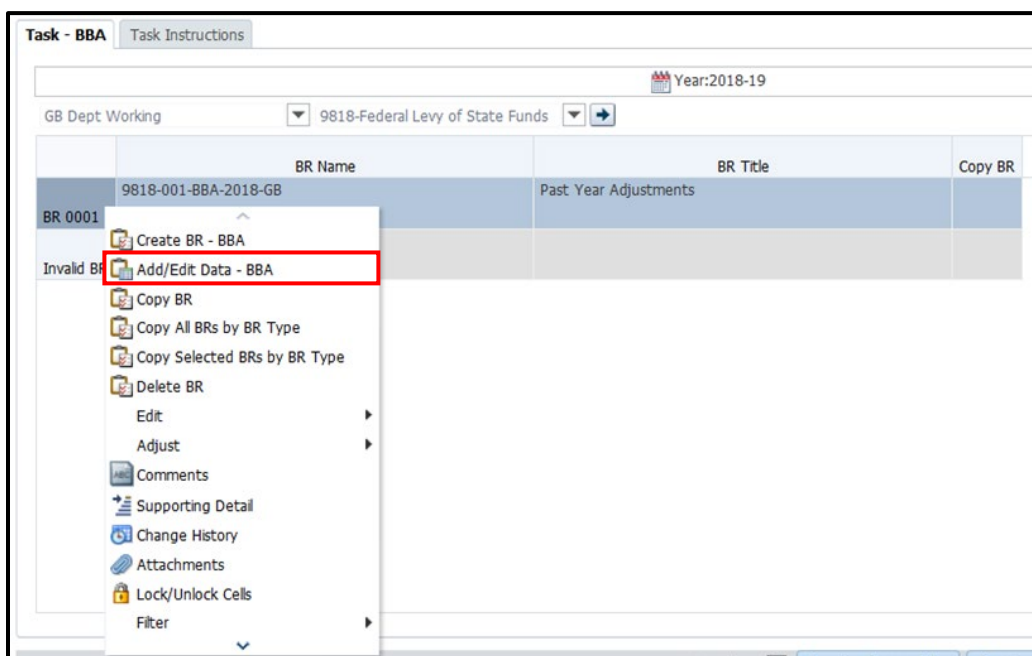
GB Dept Working 9818-Federal Levy of State Funds

**Go**

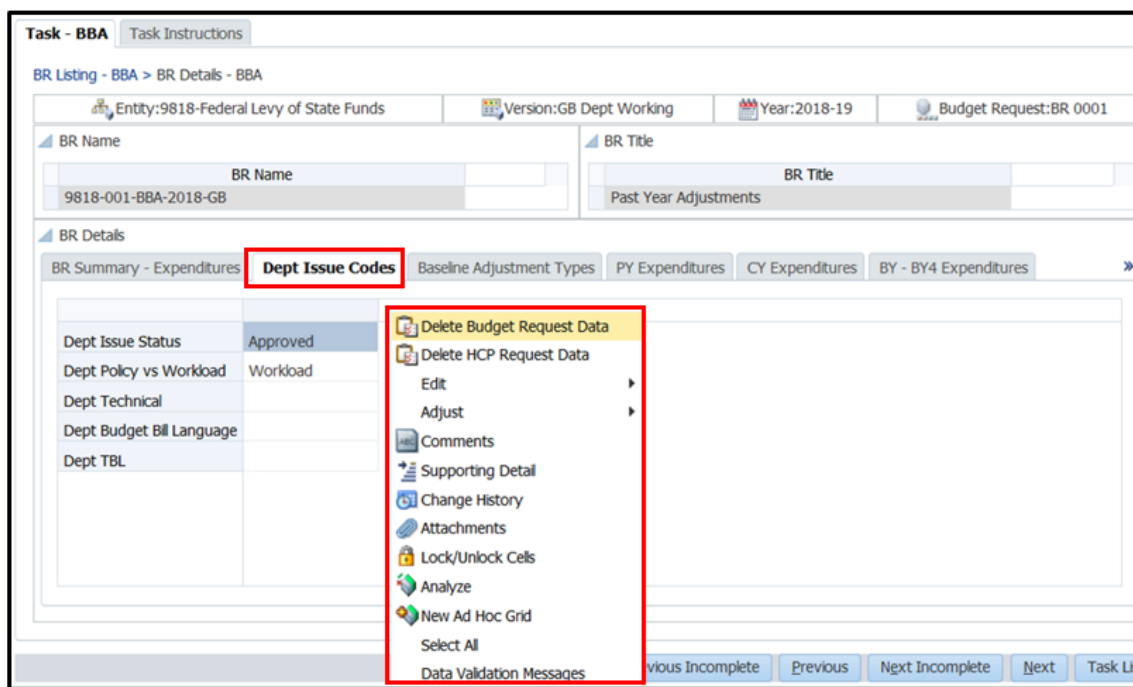
BR Name	BR Title	Copy BR
9818-001-BBA-2018-GB	Past Year Adjustments	
BR 0001		
Invalid BR		

*To clear data from a BR, follow Steps 5 through 8 below. To delete a BR, skip to Step 9.*

**Step 5:** Select the BR to be deleted by right clicking on the associated BR number and selecting **Add/Edit Data**.



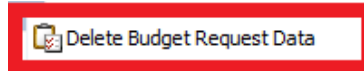
**Step 6:** Select the **Department Issue Codes** tab. Right click anywhere on the form and a pop-up menu will open.



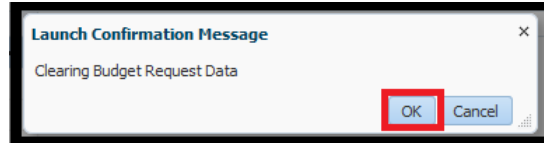
**Step 7:** To clear all dollars and positions/FTEs on the **Position Summary** tab:

*Note: Position/FTE data on the Position Change Request tab must be cleared separately and is outlined in Step 8 below.*

- Select the first option, “**Delete Budget Request Data**”.



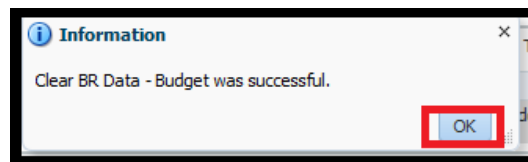
- Click **OK** on the prompt that appears to continue with the data deletion.



- As the data is being deleted, the following message displays:

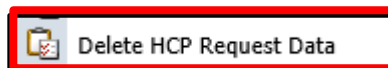


- The following message will display when all the data has been successfully deleted. Click **OK**.

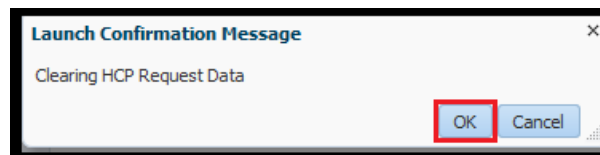


**Step 8:** If applicable, to clear position/FTE details on the Position Change Request tab:

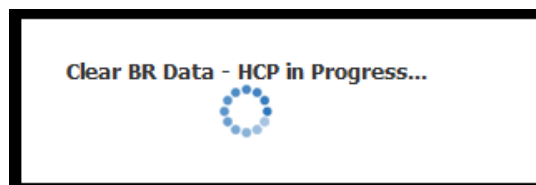
- On the **Department Issue Codes** tab, right click anywhere on the form and select the second option “**Delete HCP Request Data**”.



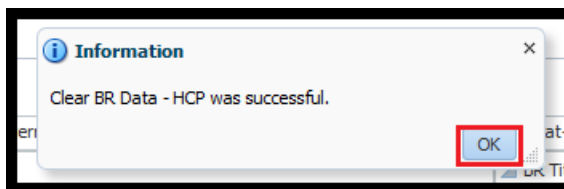
- Click **OK** on the prompt that appears to continue with the data deletion:



- As the data is being deleted, the following message displays:

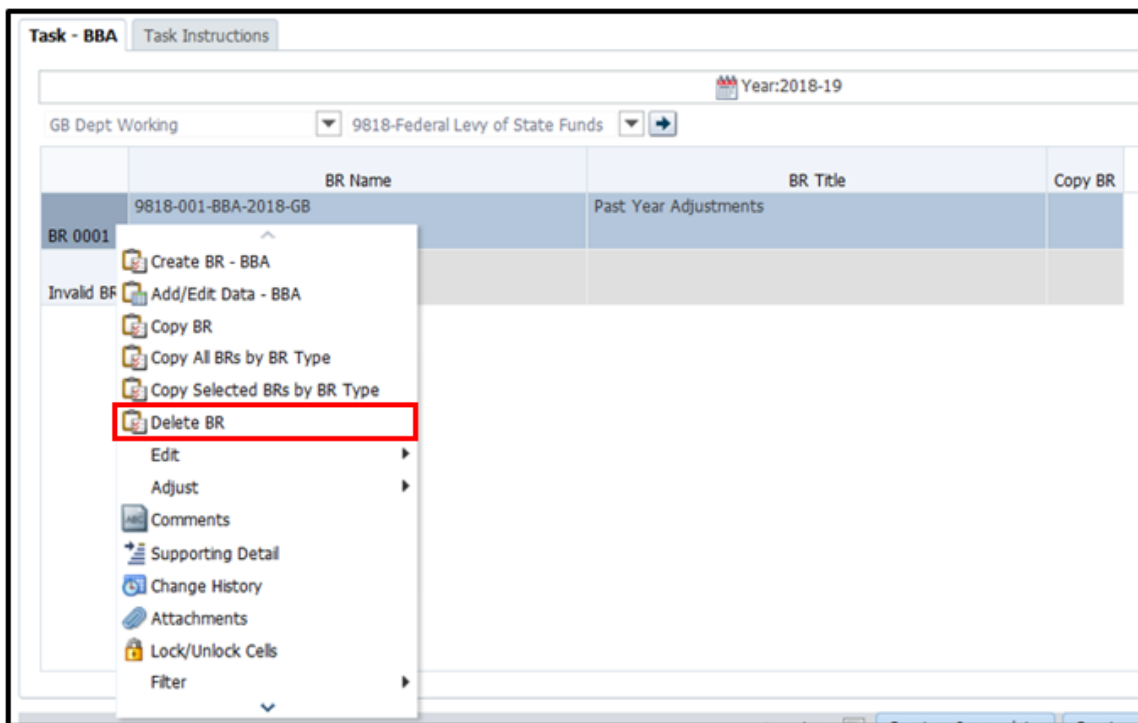


- The following message is displayed when all the data has been successfully deleted. Click **OK**.

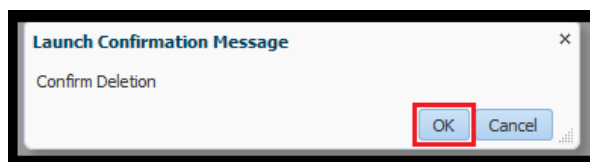


By viewing the **BR Summary-Expenditures** and **Position Change Request** tabs, a user can confirm that the data has been cleared/deleted from the BR if there is no data displayed on the forms.

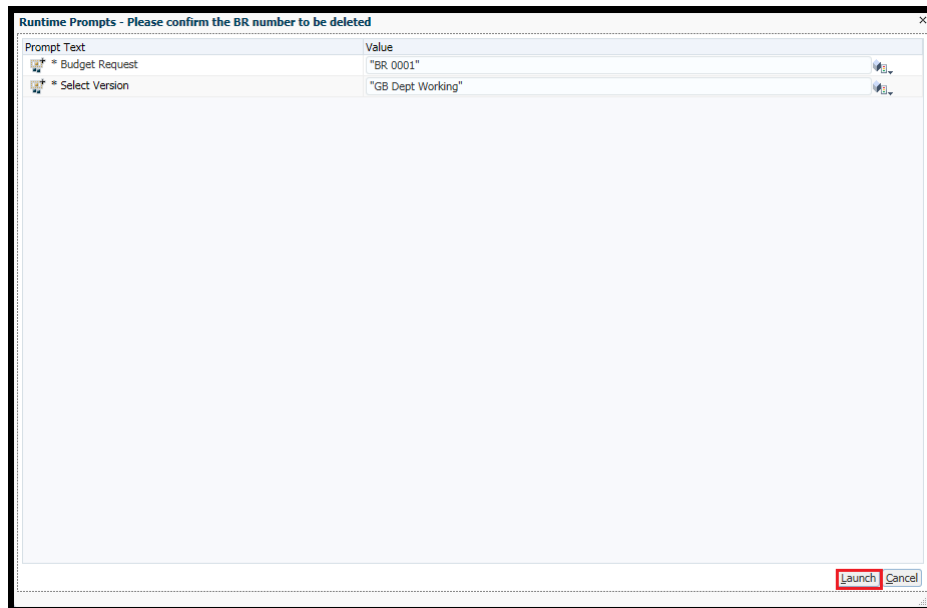
**Step 9:** To delete a BR, navigate to the BR Listing page, right click on the associated BR to be deleted and select **Delete BR**.



**Step 10:** Click **OK** on the prompt that appears to continue with the BR deletion.



**Step 11:** Verify the associated BR number and the Version are correct before clicking **Launch**.

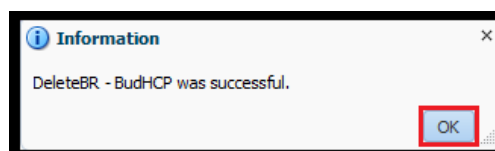


Runtime Prompts - Please confirm the BR number to be deleted

Prompt Text	Value
* Budget Request	"BR 0001"
* Select Version	"GB Dept Working"

Launch Cancel

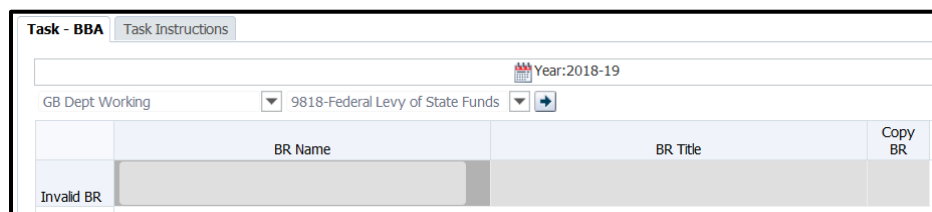
**Step 12:** The following message displays when all the data has been successfully deleted. Click **OK**. The BR container has been deleted.



Information

DeleteBR - BudHCP was successful.

OK



Task - BBA Task Instructions

Year: 2018-19

GB Dept Working 9818-Federal Levy of State Funds

	BR Name	BR Title	Copy BR
Invalid BR			

Congratulations. You have successfully cleared data from a BR and deleted a BR.

### **Who to Contact for Questions/Problems:**

#### **Hyperion Log-in Access/Password Issues:**

Contact the **FI\$Cal Service Center (FSC)**

- Phone: 1-855-FISCAL0 (1-855-347-2250) (Toll Free)
- <https://fiscal.ca.gov/user-support/fiscal-service-center/>

#### **Business/Process Questions:**

Contact your Finance Budget Analyst