

# How to Copy Data to Out Years in a Budget Request in Hyperion

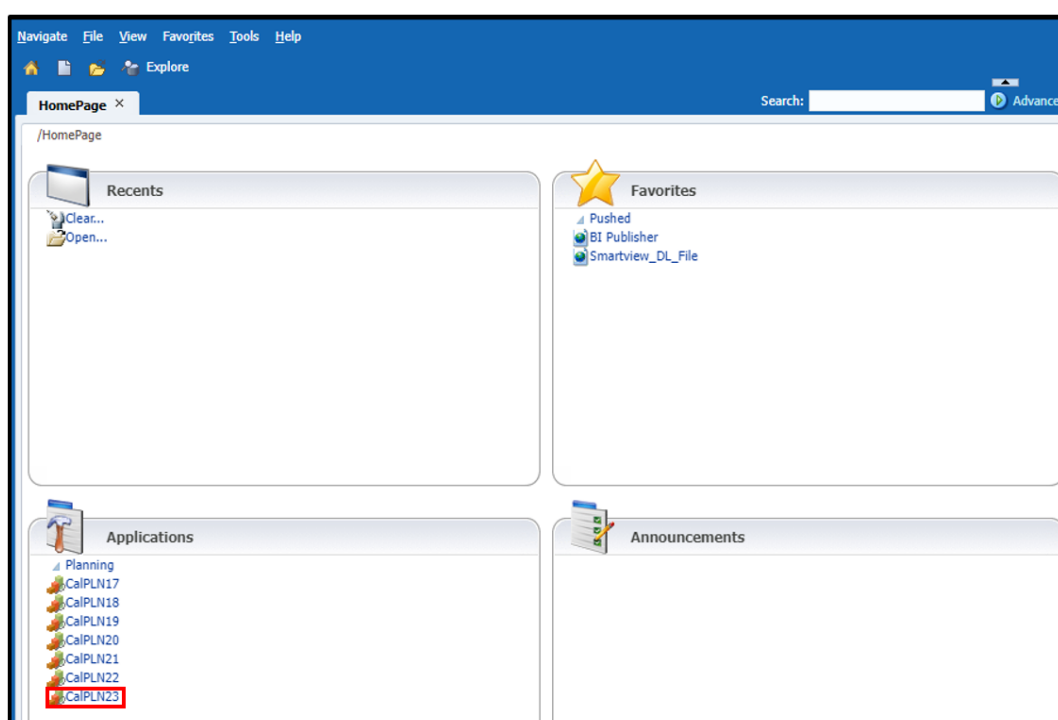
## By Department of Finance

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

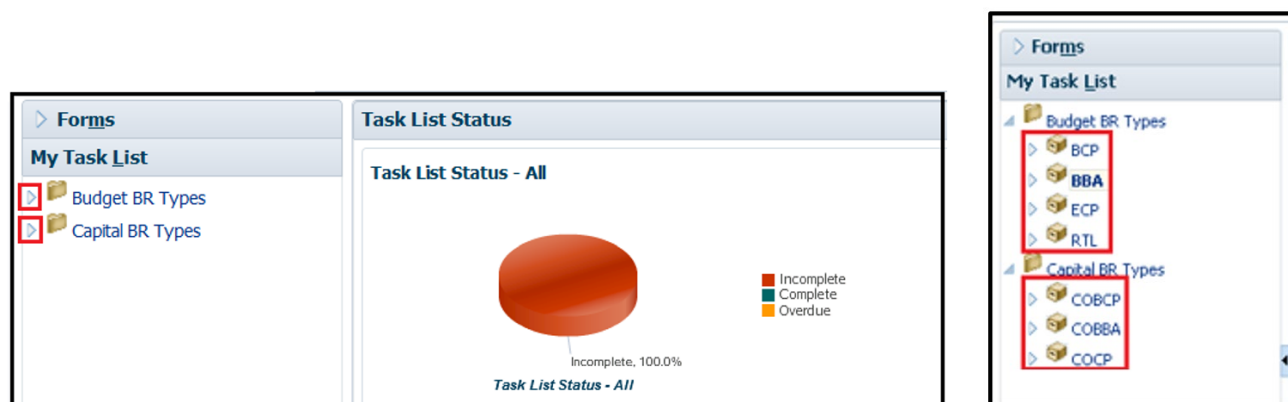
**Purpose:** Provides instructions on how to copy data from Budget Year (BY) to out years in a Budget Request (BR). Either from BY through BY+4 or from BY+1 through BY+4.

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

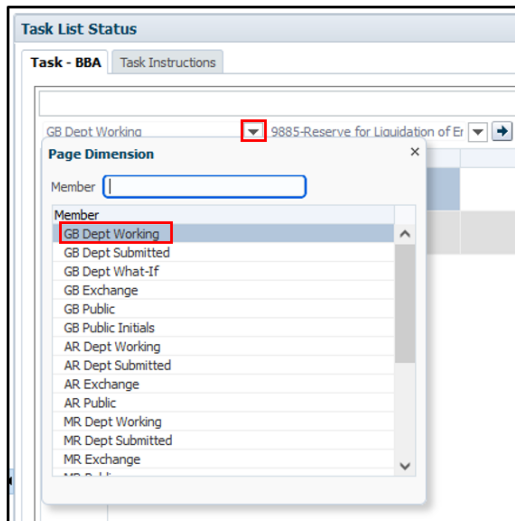
'XX' represents the first part of the fiscal year. In this example we are in the development of the 2023-24 budget cycle, therefore we will choose CalPLN23.



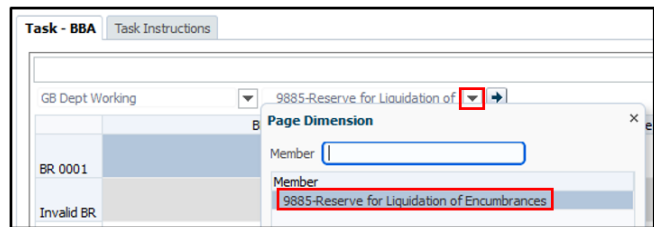
**Step 2:** Navigate to **My Task List** and select the **BR Type** from the left pane.



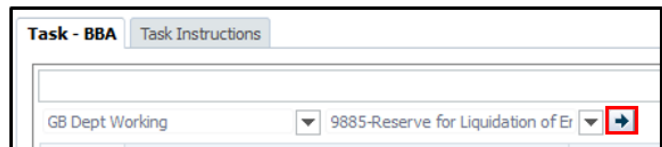
**Step 3:** Select the POV—**Version** and **BU**. Then click the “Go” arrow (  ) to proceed.



The screenshot shows the 'Task List Status' window with the 'Task - BBA' tab selected. The 'Page Dimension' dropdown menu is open, showing a list of members. The member 'GB Dept Working' is highlighted with a red box.

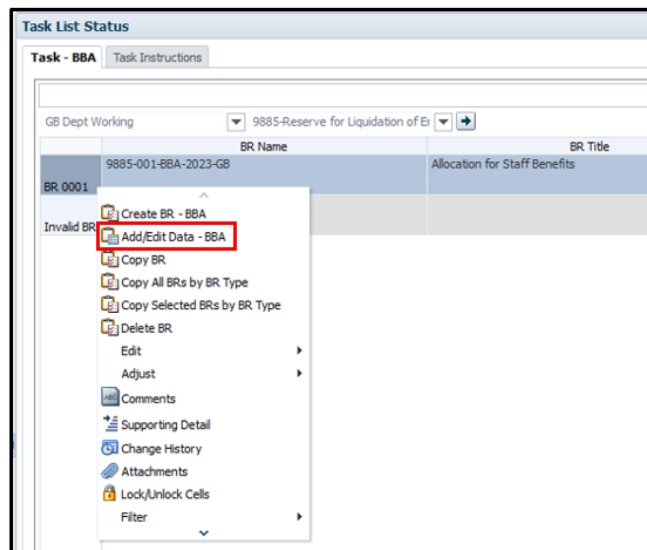


The screenshot shows the 'Task List Status' window with the 'Task - BBA' tab selected. The 'Page Dimension' dropdown menu is open, showing a list of members. The member '9885-Reserve for Liquidation of Encumbrances' is highlighted with a red box.



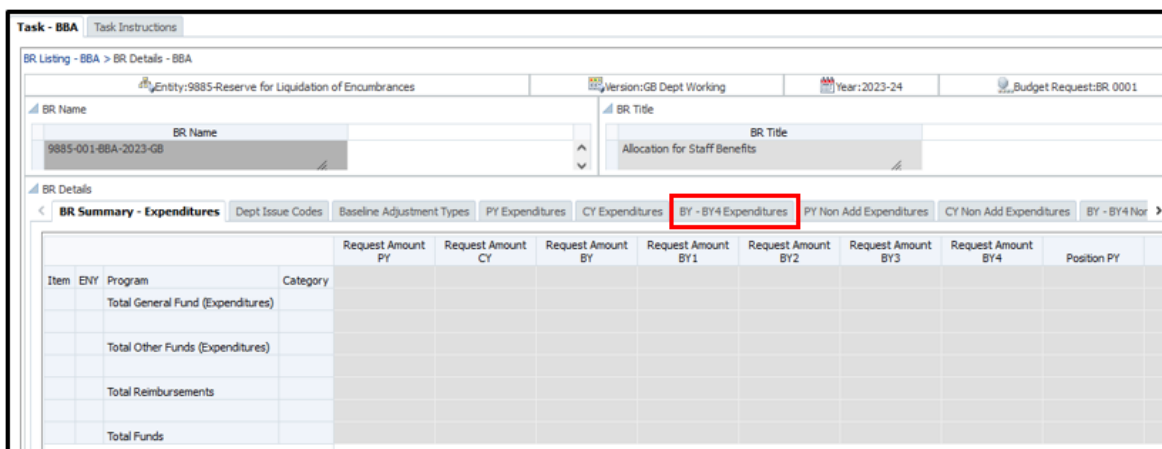
The screenshot shows the 'Task List Status' window with the 'Task - BBA' tab selected. The 'Go' arrow button is highlighted with a red box.

**Step 4:** Select the desired BR, right click, and select **Add/Edit Data** from the selection list.



The screenshot shows the 'Task List Status' window with the 'Task - BBA' tab selected. The context menu for BR 0001 is open, and the 'Add/Edit Data - BBA' option is highlighted with a red box.

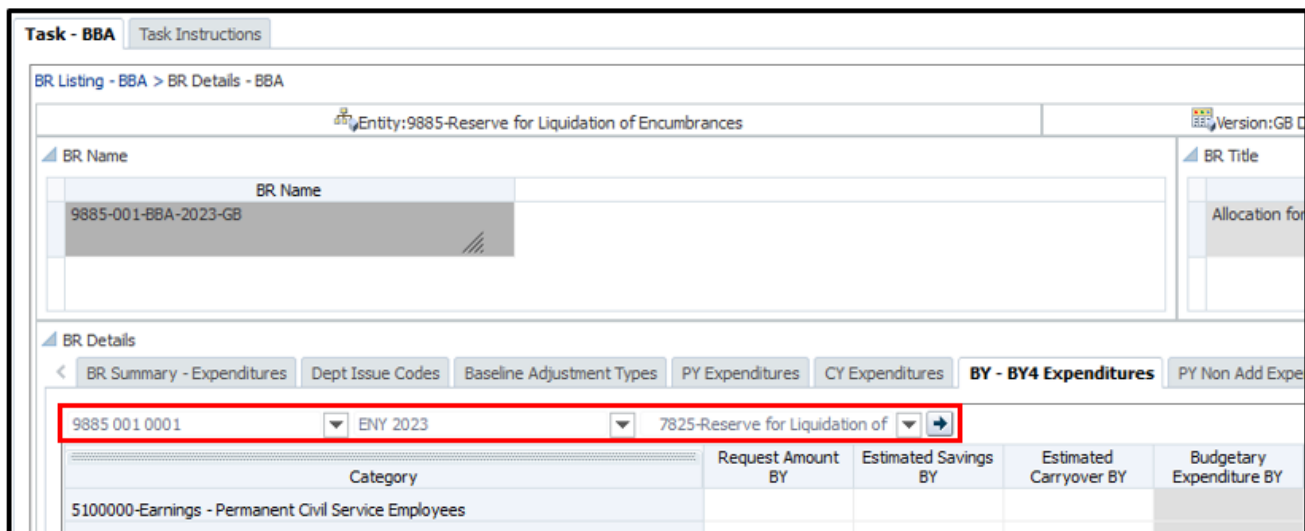
**Step 5:** Select the **BY - BY4 Expenditures** tab.



The screenshot shows the 'Task List Status' window with the 'Task - BBA' tab selected. The 'BY - BY4 Expenditures' tab is highlighted with a red box. The table below shows the data for the selected BR.

Item	ENV	Program	Category	Request Amount PY	Request Amount CY	Request Amount BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4	Position PY
		Total General Fund (Expenditures)									
		Total Other Funds (Expenditures)									
		Total Reimbursements									
		Total Funds									

**Step 6:** Select the desired point-of-view (POV)—**3-part item** (BU-Reference-Fund), **ENY**, and **program** from the drop down menus. Then click the “GO” arrow. If the POV selected is NOT an active and valid combination, then the tab details will not display and a message will display instead. Double check the POV selected by verifying the item is active and the correct program was selected for the department and contact your Finance Budget Analyst.



Task - BBA Task Instructions

BR Listing - BBA > BR Details - BBA

Entity:9885-Reserve for Liquidation of Encumbrances Version:GB

BR Name

BR Name

9885-001-BBA-2023-GB

BR Title

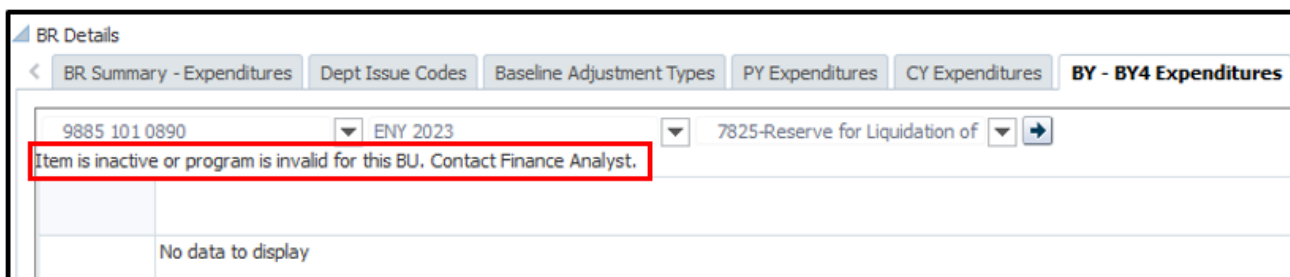
Allocation for

BR Details

BR Summary - Expenditures Dept Issue Codes Baseline Adjustment Types PY Expenditures CY Expenditures **BY - BY4 Expenditures** PY Non Add Expenditures

9885 001 0001 ENY 2023 7825-Reserve for Liquidation of

Category	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY
5100000-Earnings - Permanent Civil Service Employees				




BR Details

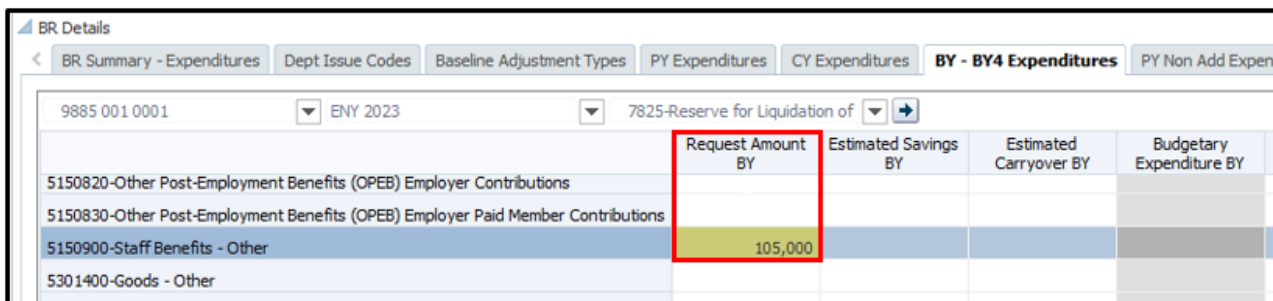
BR Summary - Expenditures Dept Issue Codes Baseline Adjustment Types PY Expenditures CY Expenditures **BY - BY4 Expenditures** PY Non Add Expenditures

9885 101 0890 ENY 2023 7825-Reserve for Liquidation of

Item is inactive or program is invalid for this BU. Contact Finance Analyst.

No data to display

**Step 7:** Enter data under the **Request Amount BY** column and save the data using the **Save** button  or selecting **Ctrl + S** on your keyboard.



BR Details

BR Summary - Expenditures Dept Issue Codes Baseline Adjustment Types PY Expenditures CY Expenditures **BY - BY4 Expenditures** PY Non Add Expenditures

9885 001 0001 ENY 2023 7825-Reserve for Liquidation of

Category	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY
5150820-Other Post-Employment Benefits (OPEB) Employer Contributions				
5150830-Other Post-Employment Benefits (OPEB) Employer Paid Member Contributions				
5150900-Staff Benefits - Other	105,000			
5301400-Goods - Other				

If successfully saved, the fields will change from a yellow background color (meaning that the changes made have not been saved yet) to a white background color and a successful pop-up message will appear. Click **OK**.

BR Name: 9885-001-BBA-2023-GB

BR Title: Allocation for Staff Benefits

BR Details: BR Summary - Expenditures | Dept Issue Codes | Baseline Adjustment Types | PY Expenditures | CY Expenditures | **BY - BY4 Expenditures** | PY Non Add Expenditures | CY Non Add Expenditures | BY - BY4 Non Add Expenditures | PY Position

9885 001 0001 | ENY 2023 | 7825-Reserve for Liquidation of Er

	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY
5150820-Other Post-Employment Benefits (OPEB) Employer Contributions				
5150830-Other Post-Employment Benefits (OPEB) Employer Paid Member Contributions				
5150900-Staff Benefits - Other	105,000			105,000
5301400-Goods - Other				

**Information**

Messages for this page are listed below.

- The data has been saved.
- Rule was run successfully

OK

**Step 8:** Right click anywhere on the form and select “Copy BY Amount to Out Years (or Copy BY1 Amount to Out Years).”

**Note:** The business rule will be executed and will copy all data entered at ALL POVs for the entire BR within the same form/tab (see step 10 for the different forms/tabs).

BR Details: BR Summary - Expenditures | Dept Issue Codes | Baseline Adjustment Types | PY Expenditures | CY Expenditures | **BY - BY4 Expenditures** | PY Non Add Expenditures | CY Non Add Expenditures | BY - BY4 Non Add Expenditures | PY Position

9885 001 0001 | ENY 2023 | 7825-Reserve for Liquidation of Er

	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4
5150820-Other Post-Employment Benefits (OPEB) Employer Contributions								
5150830-Other Post-Employment Benefits (OPEB) Employer Paid Member Contributions								
5150900-Staff Benefits - Other	105,000			105,000				
5301400-Goods - Other								
5302900-Printing - Other								
5304800-Communications - Other								
5306700-Postage - Other								
5308900-Insurance - Other								
5320490-Travel - In State - Other								
5320890-Travel - Out of State - Other								
5322400-Training - Tuition and Registration								
5324350-Rents and Leases								
5324550-Special Repairs and Deferred Maintenance								
5326900-Utilities - Other								
5340310-Legal - Attorney General								
5340320-Office of Administrative Hearings								
5340330-Consulting and Professional Services - Interdepartmental - Other								
5340580-Consulting and Professional Services - External - Other								

Right-click context menu options:

- Copy BY Amount to Out Years
- Copy BY1 Amount to Out Years
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History
- Attachments
- Lock/Unlock Cells
- Filter
- Sort
- Analyze
- New Ad Hoc Grid
- Select All

After successfully copying, the following message will be displayed. Click **OK**.

BR Name: 9885-001-BBA-2023-GB

BR Title: Allocation for Staff Benefits

BR Details: BR Summary - Expenditures | Dept Issue Codes | Baseline Adjustment Types | PY Expenditures | CY Expenditures | **BY - BY4 Expenditures** | PY Non Add Expenditures | CY Non Add Expenditures | BY - BY4 Non Add Expenditures | PY Position

9885 001 0001 | ENY 2023 | 7825-Reserve for Liquidation of Er

	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4
5150820-Other Post-Employment Benefits (OPEB) Employer Contributions								
5150830-Other Post-Employment Benefits (OPEB) Employer Paid Member Contributions								
5150900-Staff Benefits - Other	105,000			105,000	105,000	105,000	105,000	105,000
5301400-Goods - Other								
5302900-Printing - Other								

**Information**

CopyByToOutYears\_Request was successful.

OK

**Step 9:** Validate the copy by either viewing the change on the specific data entry form or navigating to the **BR Summary – Expenditures** tab or run a **Detailed Multi-Year Expenditures report** (after a FR report refresh).

BR Details				Request Amount PY	Request Amount CY	Request Amount BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4
BR Summary - Expenditures										
Item	ENY	Program	Category							
9885 001 0001	ENY 2023	7825-Reserve for Liquidation of Encumbrances	\$150900-Staff Benefits - Other			105,000	105,000	105,000	105,000	105,000
		Total General Fund (Expenditures)				105,000	105,000	105,000	105,000	105,000
		Total Other Funds (Expenditures)								
		Total Reimbursements								
		Total Funds				105,000	105,000	105,000	105,000	105,000

**Congratulations. You have successfully copied data to out years.**

The same process outlined above can be followed to copy BY data to out years or copy BY1 data to out years on the following Hyperion data entry forms:


**Budget (BCP, BBA, ECP & RTL)**

- BY - BY4 Expenditures
- BY - BY4 Non Add Expenditures
- BY - BY4 Position Summary
- Position Change Request
- BY - BY4 Revenues

**Capital (COBCP & COBBA)**

- BY - BY4 Expenditures - Capital
- BY - BY4 Non Add Expenditures – Capital

**Note about the revenue forms:**

Please note that the revenue forms contain parent level revenue category codes (these are the grayed-out 3-digit revenue category codes displayed on the form [i.e., 417–Other Revenue]). To view the aggregated data (at the parent level) after running the business rule in the **Revenue BY - BY4** tab, users will need to select the **Save** button . This action is not required to view data in the **BR Summary – Revenue** tab. Please see the revenue examples on the following pages.

In a RTL BR on the BY – BY4 Revenue form and selecting to run the “Copy BY Amount to Out Years” business rule:

BR Details

BR Summary - Revenues Dept Issue Codes Agenda Groups PY Revenues CY Revenues **BY - BY4 Revenues** Revenue Transfers Loans Legislative Hearings

0954 787 0001 ENY 2018 No Program

	Revenues BY	Revenues BY1	Revenues BY2	Revenues BY3	Revenues BY4
4172800-Parking Violations					
4172900-Penalty Assessments - Criminal Fines					
4172950-Penalty Assessment - GC 761047 DNA ID					
4173000-Penalty Assessments - Other					
4173100-Personal Income Tax - Penalties and Interest					
4173200-Proceeds from Estates of Deceased Persons					
4173300-Sales - Other					
4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-	14,000,000				
4173500-Settlements and Judgments - Other					
4173600-State Public Land Sales					
4173700-Subsequent Injuries Revenue					
4173800-Traffic Violations					
4173900-Tribal Gaming Revenues					
4174000-Unclaimed Contributions					
4174100-Unemployment and Disability Insurance Contributions - Penalties and Inte					
4174200-Uninsured Motorist Fees					
417-Other Revenue	14,000,000				

Context menu options: Copy BY Amount to Out Years, Copy BY1 Amount to Out Years, Edit, Adjust, Comments, Supporting Detail, Change History, Attachments, Lock/Unlock Cells, Analyze, New Ad Hoc Grid, Select All, Data Validation Messages, Apply

BY – BY4 Revenue form after running the “Copy BY Amount to Out Years” business rule:

BR Details

BR Summary - Revenues Dept Issue Codes Agenda Groups PY Revenues CY Revenues **BY - BY4 Revenues** Revenue Transfers Loans Legislative Hearings

0954 787 0001 ENY 2018 No Program

	Revenues BY	Revenues BY1	Revenues BY2	Revenues BY3	Revenues BY4
4173000-Penalty Assessments - Other					
4173100-Personal Income Tax - Penalties and Interest					
4173200-Proceeds from Estates of Deceased Persons					
4173300-Sales - Other					
4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000
4173500-Settlements and Judgments - Other					
4173600-State Public Land Sales					
4173700-Subsequent Injuries Revenue					
4173800-Traffic Violations					
4173900-Tribal Gaming Revenues					
4174000-Unclaimed Contributions					
4174100-Unemployment and Disability Insurance Contributions - Pen					
4174200-Uninsured Motorist Fees					
417-Other Revenue	14,000,000				

**BY – BY4 Revenue form after running the business rule and selecting save:**

BR Details						
BR Summary - Revenues Dept Issue Codes Agenda Groups PY Revenues CY Revenues <b>BY - BY4 Revenues</b> Revenue Transfers Loans Legislative Hearings						
0954 787 0001 ENY 2018 No Program						
	Revenues BY	Revenues BY1	Revenues BY2	Revenues BY3	Revenues BY4	
4173000-Penalty Assessments - Other						
4173100-Personal Income Tax - Penalties and Interest						
4173200-Proceeds from Estates of Deceased Persons						
4173300-Sales - Other						
4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000	
4173500-Settlements and Judgments - Other						
4173600-State Public Land Sales						
4173700-Subsequent Injuries Revenue						
4173800-Traffic Violations						
4173900-Tribal Gaming Revenues						
4174000-Unclaimed Contributions						
4174100-Unemployment and Disability Insurance Contributions - Penalties and Inte						
4174200-Uninsured Motorist Fees						
417-Other Revenue	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000	

**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