

How to Copy Multiple Budget Requests Between Versions in Hyperion

By Department of Finance

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

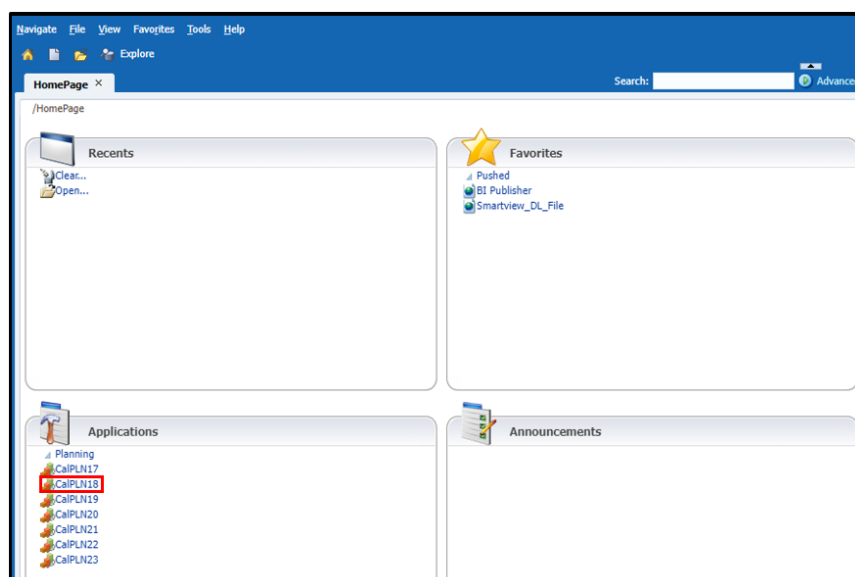
Purpose: Provides instructions for (1) copying multiple specific budget requests (BRs) of the same BR type and (2) copying all BRs of the same BR type from one version to another version at the same time in the Hyperion Planning Application.

General Information: BRs in Hyperion may be copied from one version to another version.

A common reason to copy BRs is for a department to submit BRs to the Department of Finance for review. After completion of a BR in Hyperion, departments can copy from a “Department Working” version into an “Exchange” version for Finance to review.

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 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: On the BR listing page, select the point of view (POV)—**Version** and **BU** of the BRs you want to view. Then select the “GO” arrow (➡) to proceed. From this page, you can view the **Copy BR column**.

The screenshot shows the 'Task - BBA' interface. At the top, there are tabs for 'Task' and 'Task Instructions'. Below them, a filter bar shows 'Year: 2018-19'. The main filter area has two dropdown menus: 'GB Dept Working' and '9818-Federal Levy of State Funds', followed by a 'GO' arrow button. Below the filters is a table with the following columns: 'BR Name', 'BR Title', and 'Copy BR'. The table contains five rows of data:

	BR Name	BR Title	Copy BR
BR 0002	9818-002-BBA-2018-GB	Allocation for Employee Compensation	
BR 0003	9818-003-BBA-2018-GB	Allocation for Staff Benefits	
BR 0004	9818-004-BBA-2018-GB	Section 3.60 Pension Contribution Adjustment	
BR 0005	9818-005-BBA-2018-GB	Past Year Adjustments	


If utilizing the copying of multiple specific BRs of the same BR type, then proceed to Step 4.

If utilizing the copying of ALL BRs of the same BR type, then skip ahead and proceed to Step 6B.

Step 4: Select the BRs to copy by clicking on the Copy BR cell associated with each BR desired to be copied and selecting “Yes” from the drop down menu that appears.

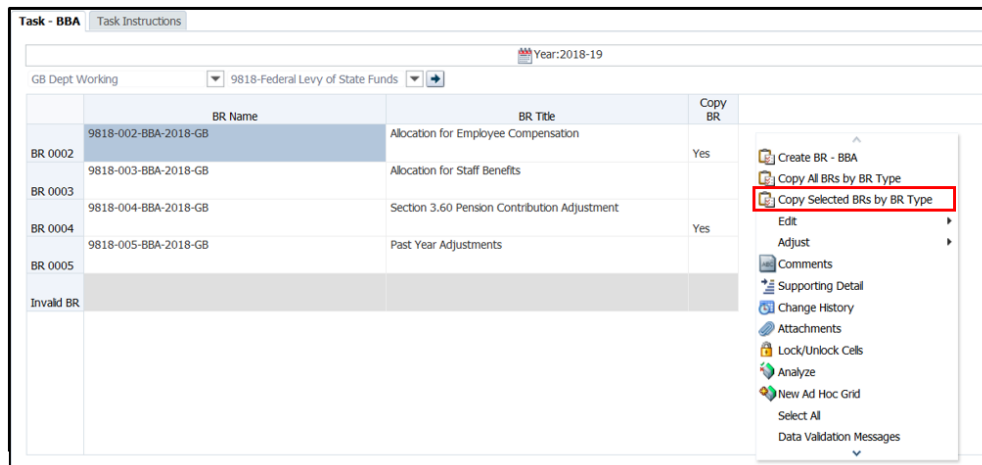
This screenshot shows the same BR listing page as before, but with the 'Copy BR' column now containing a dropdown menu for each row. The dropdown menu is open for the first row, showing the following options:

- Yes
- No

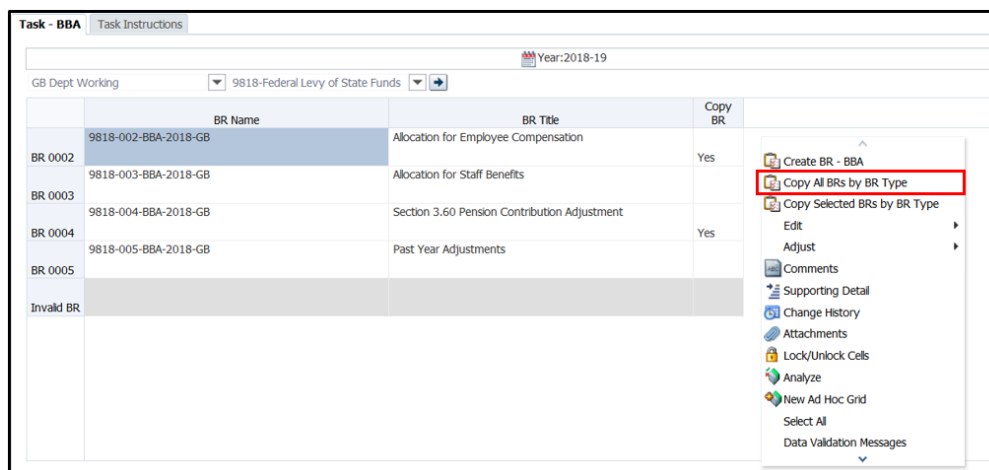
Step 5: Select **Save** () from the toolbar. The selected BRs will change from a yellow background to a white background color if the save function is successful.

This screenshot shows the BR listing page after the 'Save' action. A confirmation message box is displayed in the center of the screen, stating: 'The data has been saved.' Below the message is an 'OK' button. The 'Copy BR' column now shows 'Yes' for the first three rows (BR 0002, BR 0003, and BR 0004) and 'No' for the last row (BR 0005).

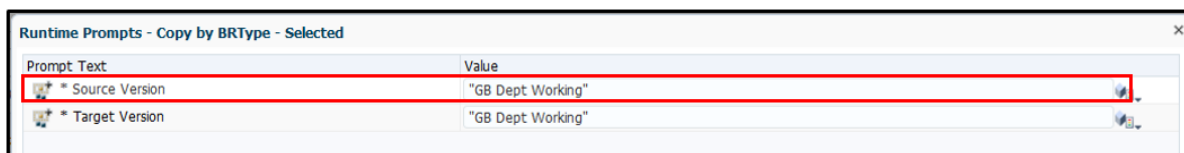
Step 6A: Right click on the form to open the option menu and select the “**Copy Selected BRs by BR Type**” option. **Then skip ahead and proceed to Step 11.**



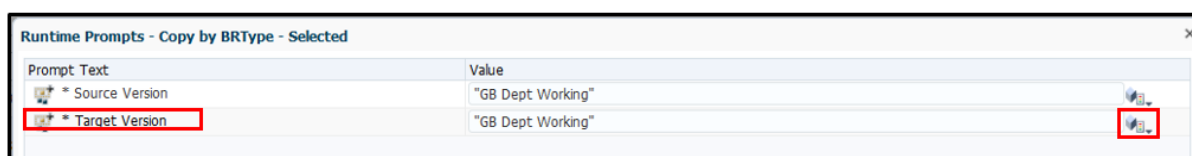
Step 6B: Right click on the form to open the option menu and select the “**Copy All BRs by BR Type**” option.



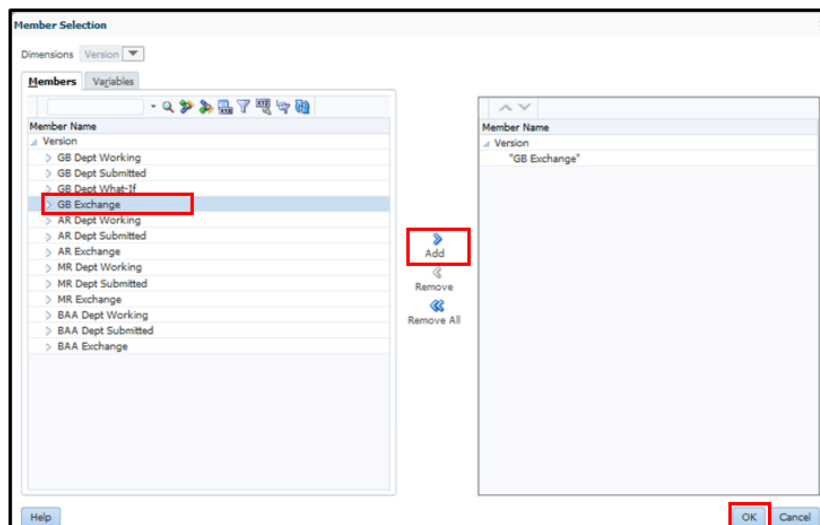
Step 7: A pop-up prompt will open. The **Source Version** the BRs are to be copied from should already be prepopulated with the version selected in Step 3. In this example that version is GB Dept Working.



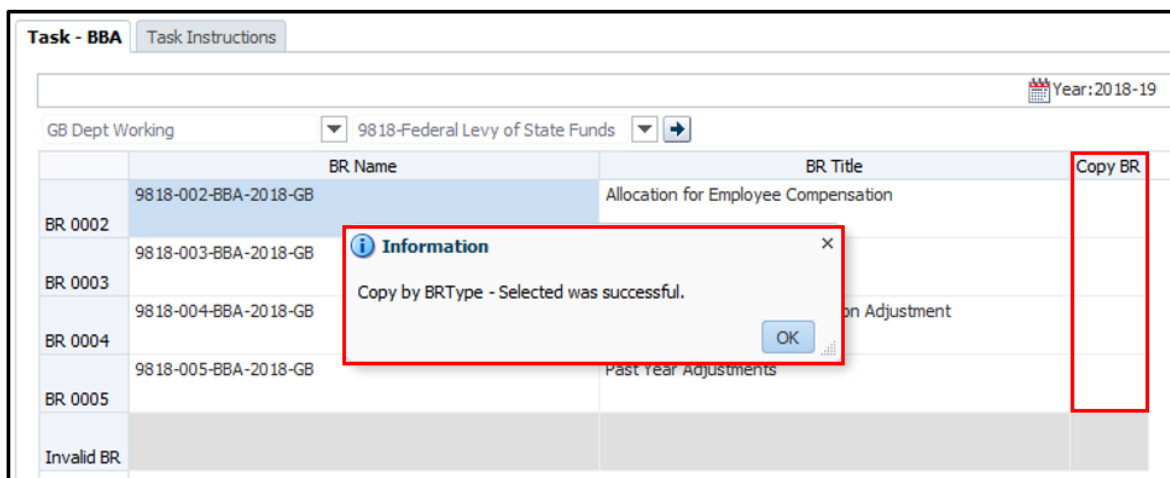
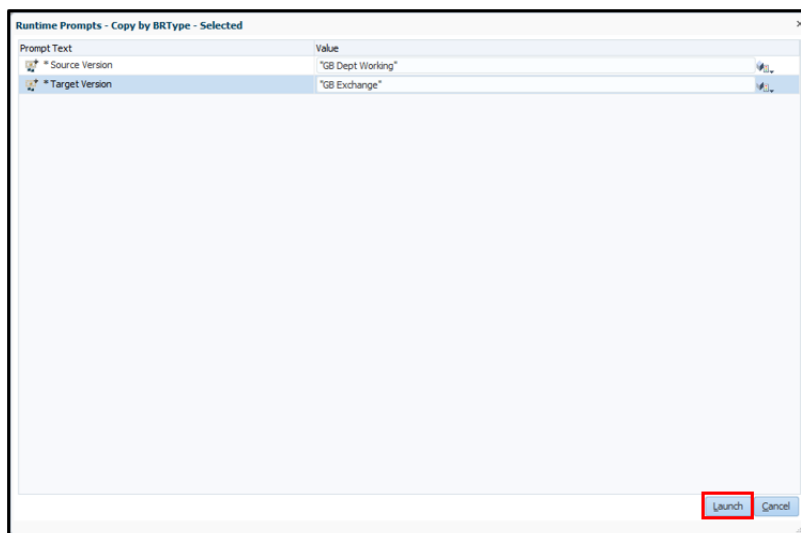
Step 8: Select a **Target Version** the BRs are to be copied to, using the button to the right. Another pop-up prompt will open.



Step 9: Proceed to select the **Target Version** using the “Add” blue arrow button and click **OK**.



Step 10: When all parameters have been selected, click **Launch**. A prompt will pop-up confirming your copy job has successfully copied and the “Copy BR” column should be cleared of any previous selections saved.



Step 11: Validate the BRs have been copied. On the BR Listing page, select the POV **version** the BRs were copied to (selected in Step 8) and **BU**, then select the “**GO**” arrow to proceed.

The screenshot shows a web interface for 'Task - BBA' with a 'Task Instructions' tab. At the top right, it says 'Year: 2018-19'. Below this, there are two dropdown menus: 'GB Exchange' and '9818-Federal Levy of State Funds', followed by a 'GO' button. A table below contains the following data:

	BR Name	BR Title	Copy BR
BR 0002	9818-002-BBA-2018-GB	Allocation for Employee Compensation	
BR 0004	9818-004-BBA-2018-GB	Section 3.60 Pension Contribution Adjustment	
Invalid BR			

Congratulations. You have successfully copied multiple BRs from one version to another version at the same time.

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