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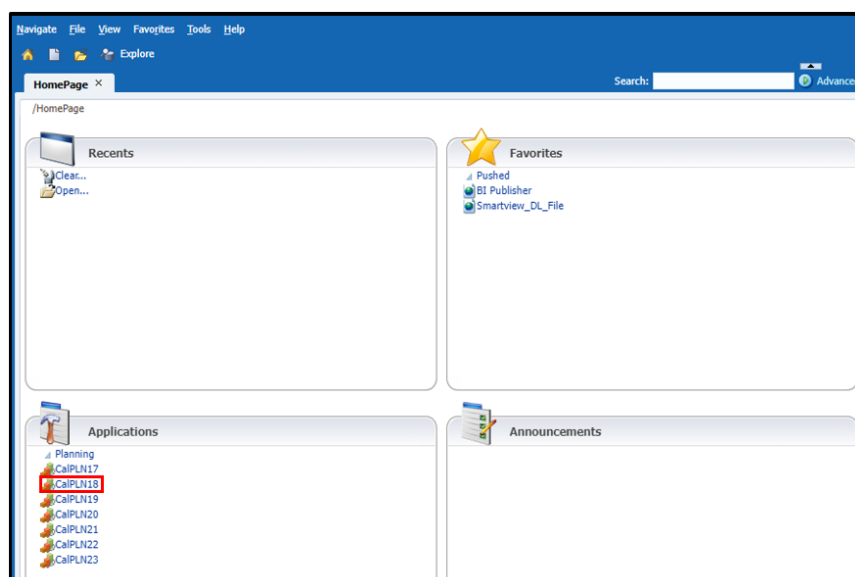
Step 2: Navigate to **My Task List** → Select the **Budget BR Type** or **Capital BR Type**. In the drop-down list, select the desired BR type. In the following example, **BBA** was selected.

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**.

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

If utilizing the copying of <u>ALL BRs of the same BR type</u>, 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.
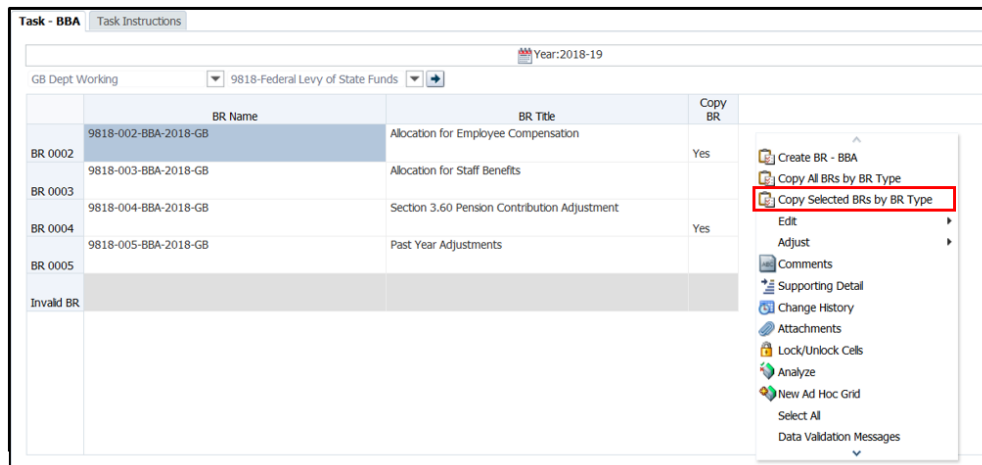

Step 5: Select **Save** (💾) from the toolbar. The selected BRs will change from a yellow background to a white background color if the save function is successful.

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.
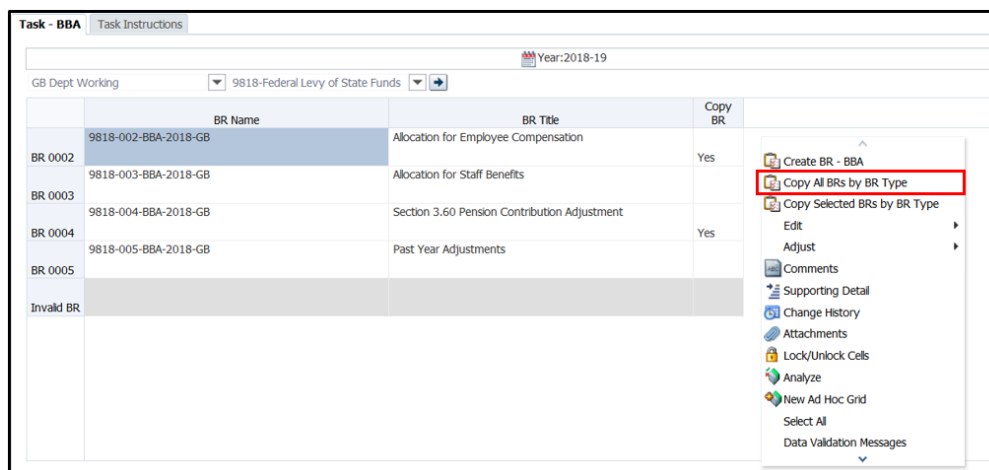

Step 7: A pop-up prompt will open. The **Source Version** the BRs are to be copied from should already be prepopulated with the version selected in Step 3. In this example that version is GB Dept Working.
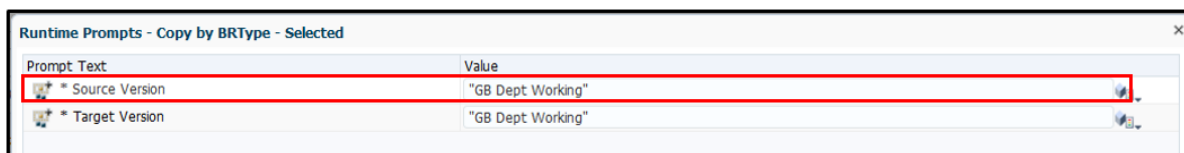

Step 8: Select a **Target Version** the BRs are to be copied to, using the button to the right. Another pop-up prompt will open.
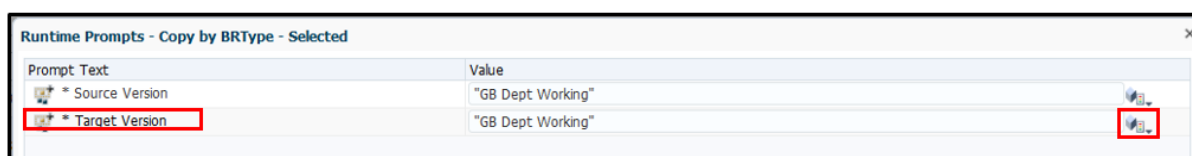
Step 9: Proceed to select the **Target Version** using the **"Add" blue arrow** button and click **OK**.
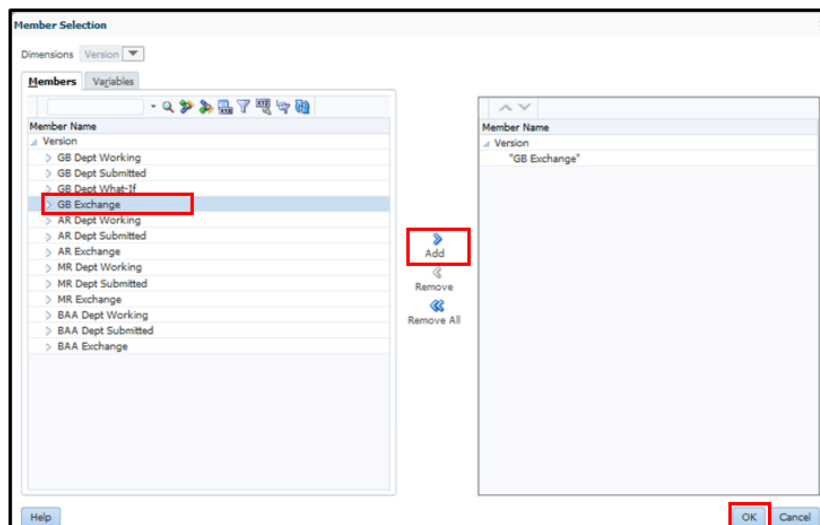
Step 10: When all parameters have been selected, click **Launch**. A prompt will pop-up confirming your copy job has successfully copied and the "Copy BR" column should be cleared of any previous selections saved.
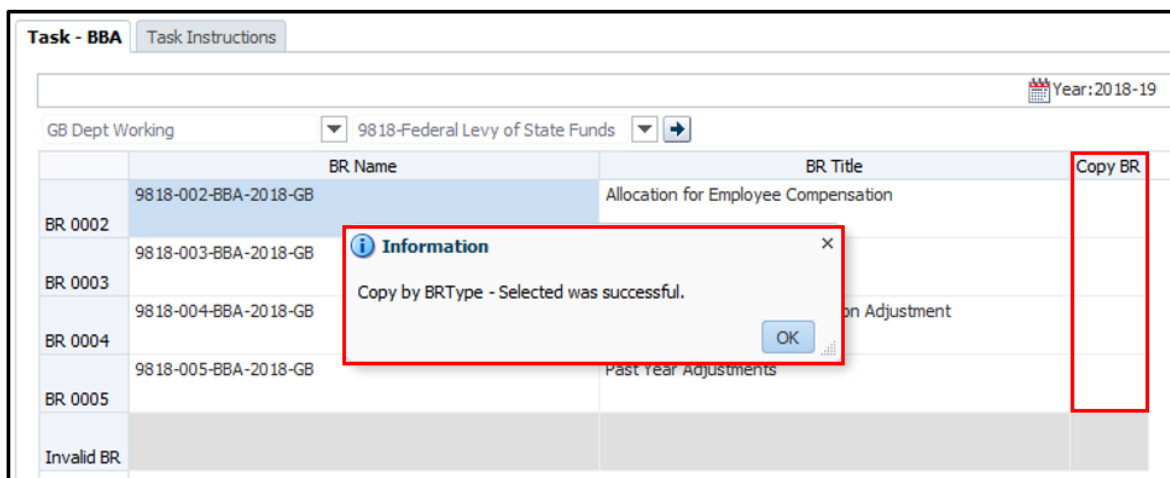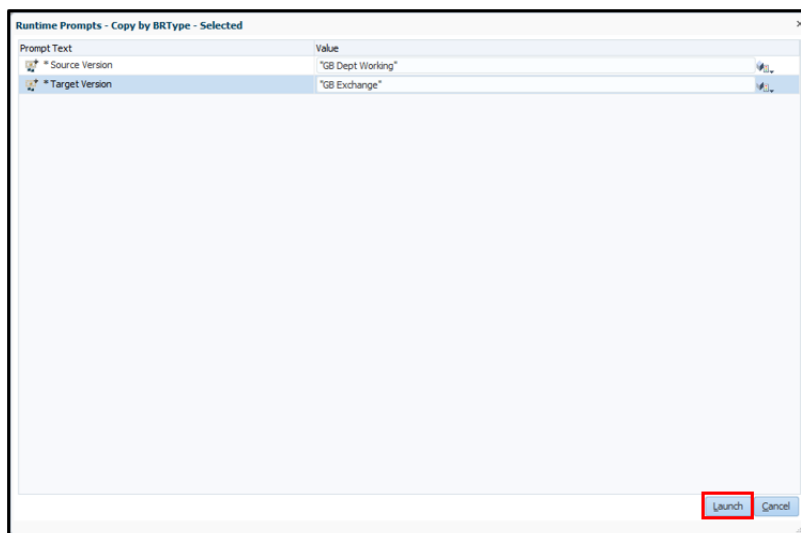
Step 11: Validate the BRs have been copied. On the BR Listing page, select the POV **version** the BRs were copied to (selected in Step 8) and **BU**, then select the "**GO**" arrow to proceed.

Task - BBA	Task Instructions			

			Year: 2018-19	
GB Exchange	▼	9818-Federal Levy of State Funds ▼ →		
	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