How to Copy an Individual Budget Request Between Versions 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 an individual Budget Request (BR) between different versions in the Hyperion Planning Application.

General Information: BRs in Hyperion may be copied from one version to another version. A common reason to copy a BR is for a department to submit a BR to the Department of Finance for review. After completion of a BR in Hyperion, departments can copy a BR 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 2023-24 budget cycle, therefore we will choose CalPLN23.
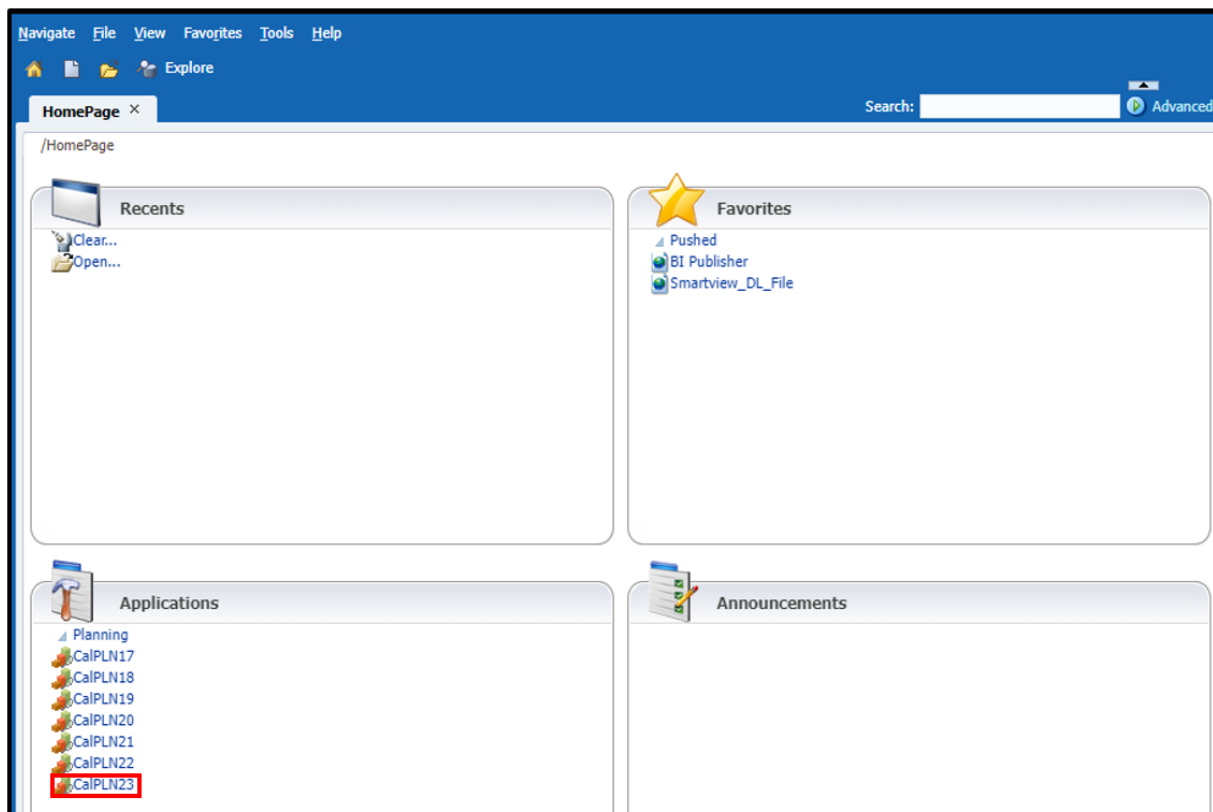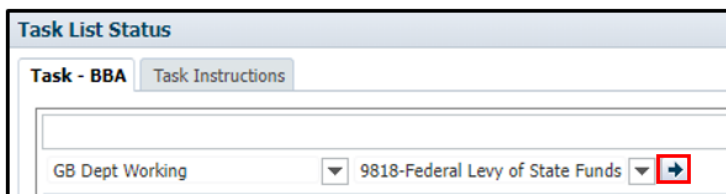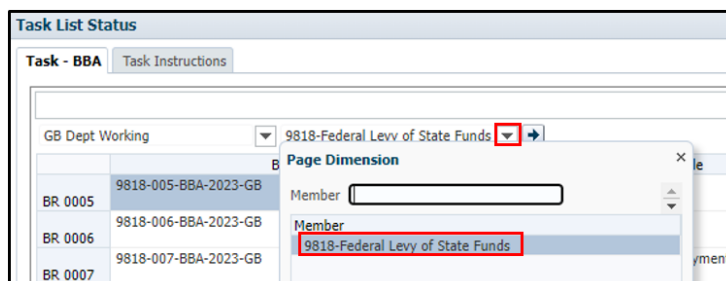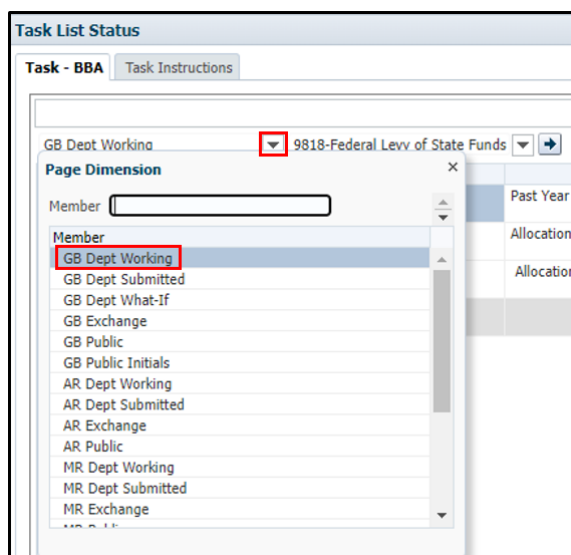
Step 2: Navigate to **My Task List** and click the triangle button to expand the list for **Budget BR Types** or **Capital BR Types**.
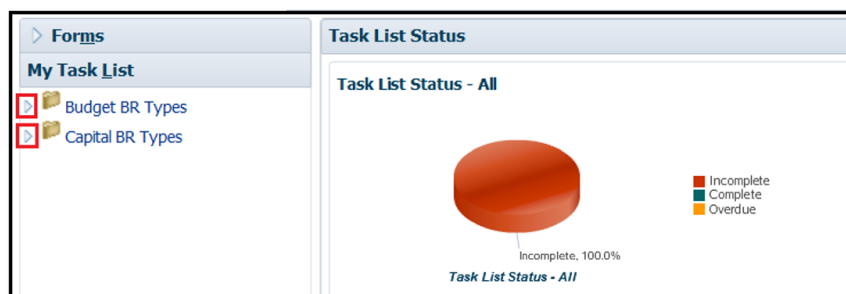
Step 3: Select the desired **BR type**. In the following example, Baseline Budget Adjustment (BBA) BR type was selected.
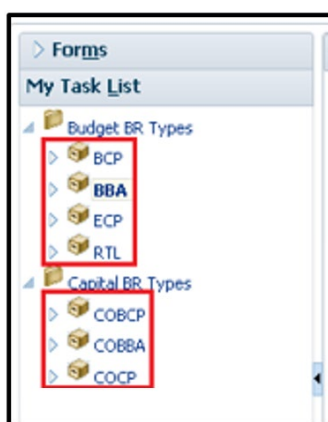
Step 4: Select the point of view (POV)—**Version and BU.** Then select the "**GO**" arrow to proceed.


**There are two different methods to copy an individual BR in Hyperion:**
1. Utilizing the "Copy BR" functionality—Follow Steps 5 through 11.
2. Utilizing the "Copy Selected BRs by BR Type" functionality—Follow Steps 12 through 19.

The following steps utilize the "Copy BR" functionality in Hyperion to Copy a BR:

Step 5: Right-click on the BR to be copied. A menu will show as below. Select **Copy BR**. A pop-up prompt will open.
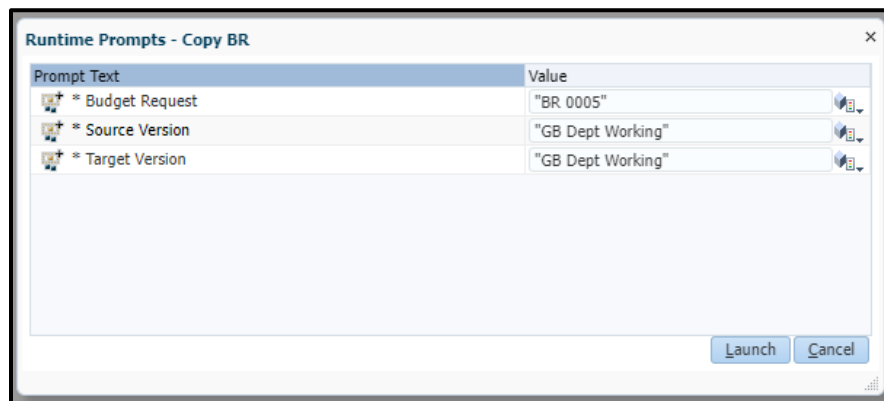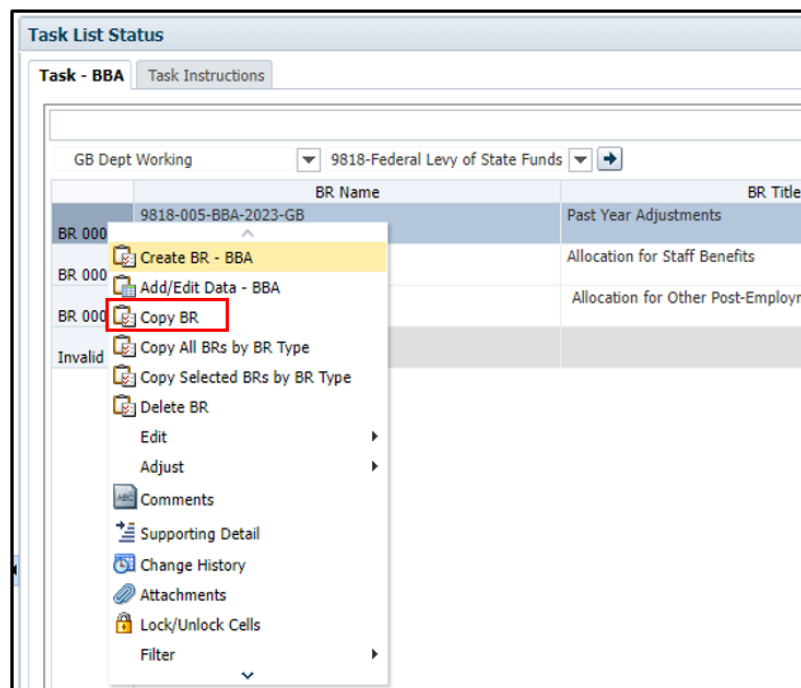

Step 6: The **Budget Request** field should be pre-populated with the associated BR number of the BR selected in Step 5.
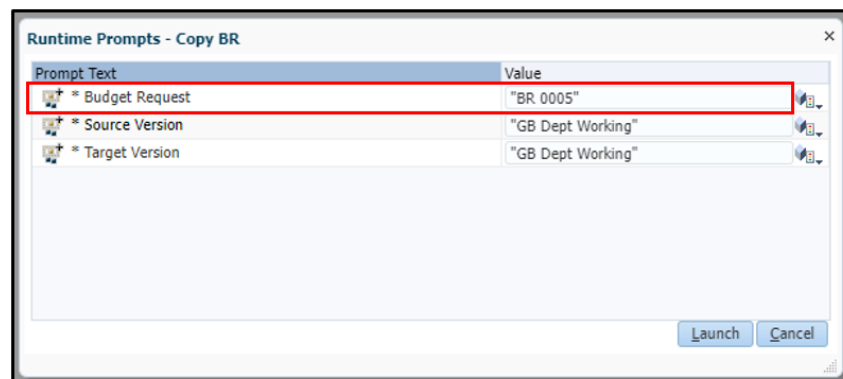
Step 7: The **Source Version** the BR is to be copied from should be pre-populated with the version selected in Step 4. In this example, that version is GB Dept Working.
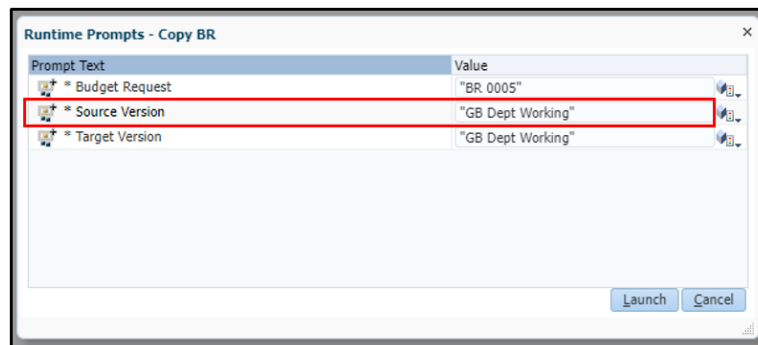

Step 8: Select a **Target Version** the BR is to be copied to, using the button to the right. Another pop-up prompt will open.
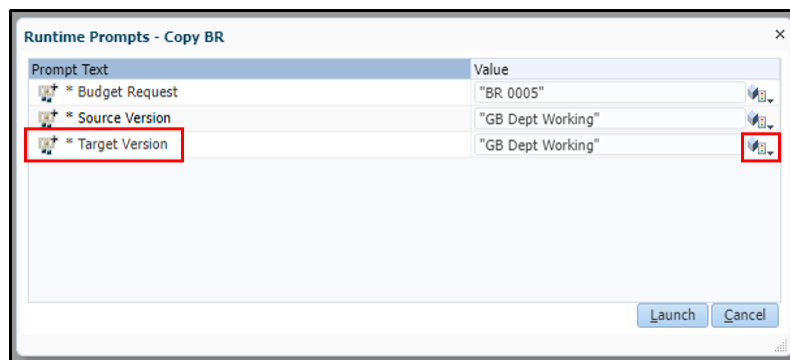

Step 9: Proceed to select the **Target Version** from the left "Member Name" selection pane using the **"Add"** button. The selected version will update accordingly to reflect in the right "Member Name" selection pane. Click **OK**.
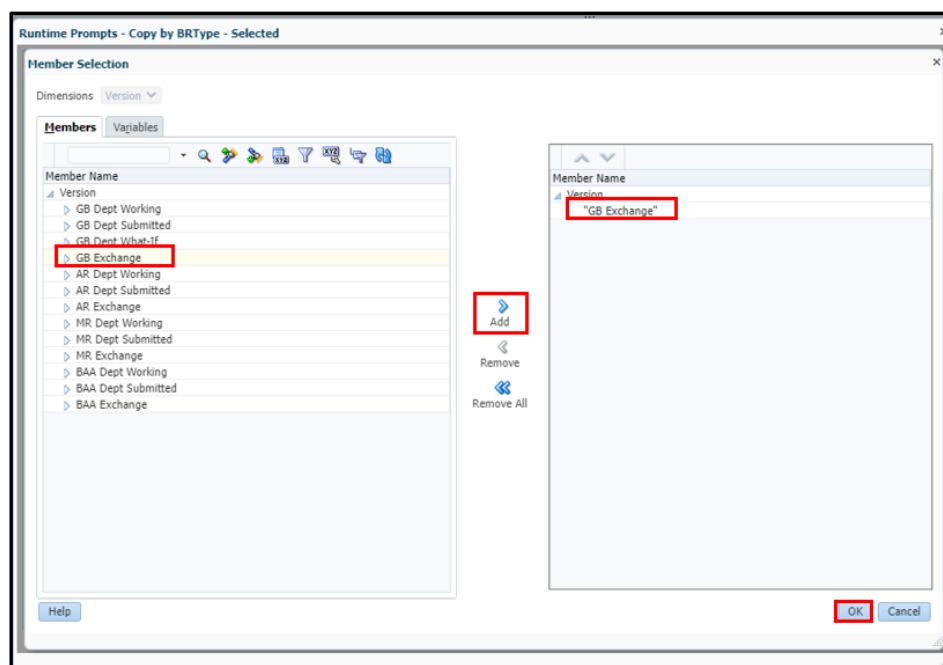
Step 10: After the parameters have been selected, click **Launch**. A prompt will pop-up confirming your copy job has successfully copied. Click **OK**.
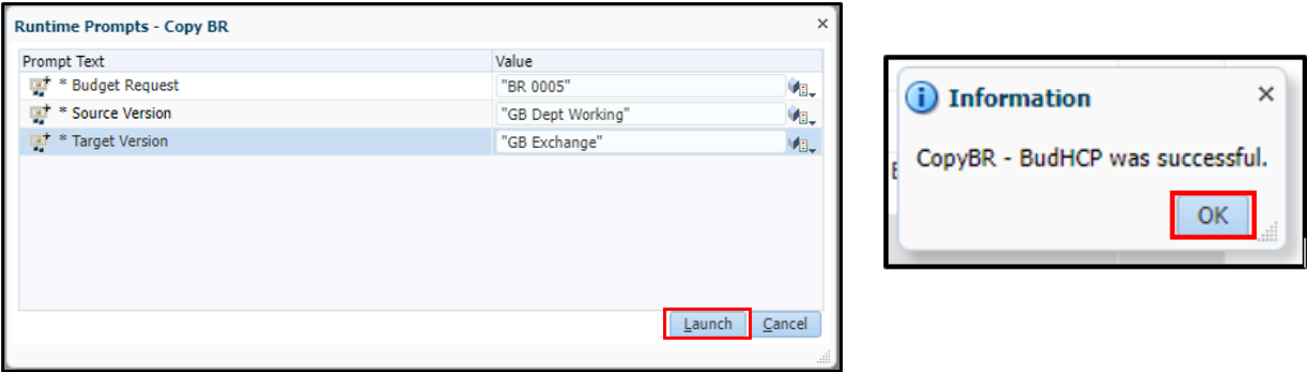

Step 11: Validate the BR has been copied. On the BR Listing page, select the POV—**Version** the BR was copied to and **BU**. Then click the "**GO**" arrow to proceed.
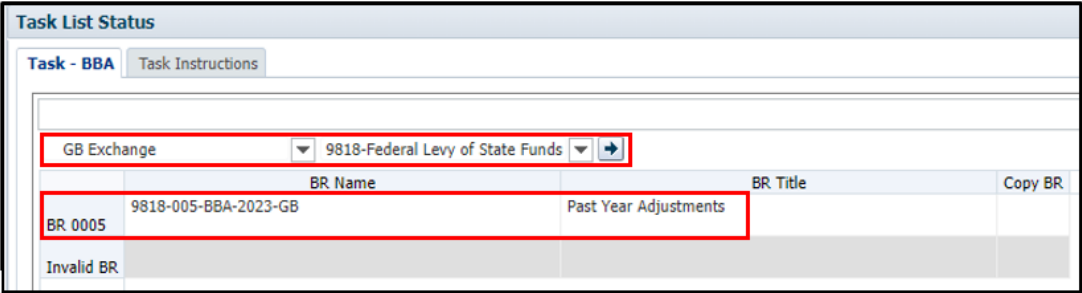

The following steps utilize the "Copy Selected BRs by BR Type" functionality in Hyperion to copy a BR:

Step 12: Select the BR to copy by clicking in the **Copy BR** cell associated with the BR. Select "**Yes**" from the drop-down menu that appears.
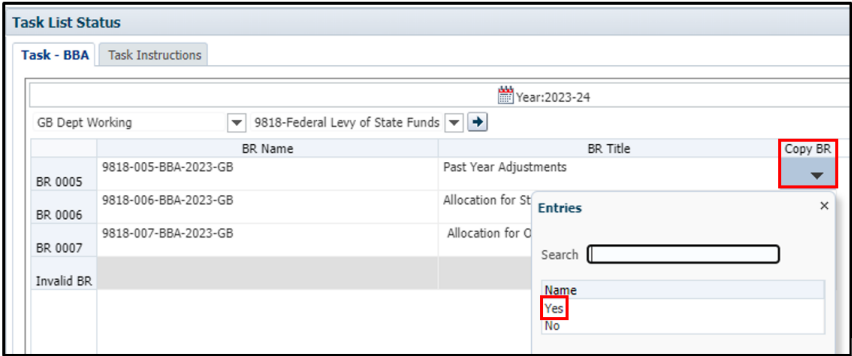

Note: Multiple BRs can be copied at the same time. Repeat Step 5 until all desired BRs are selected.

Step 13: Save the selected BR(s) to be copied by clicking the save button. All the Copy BR "Yes" cells will change from a yellow background color to a white background color, if successfully saved.
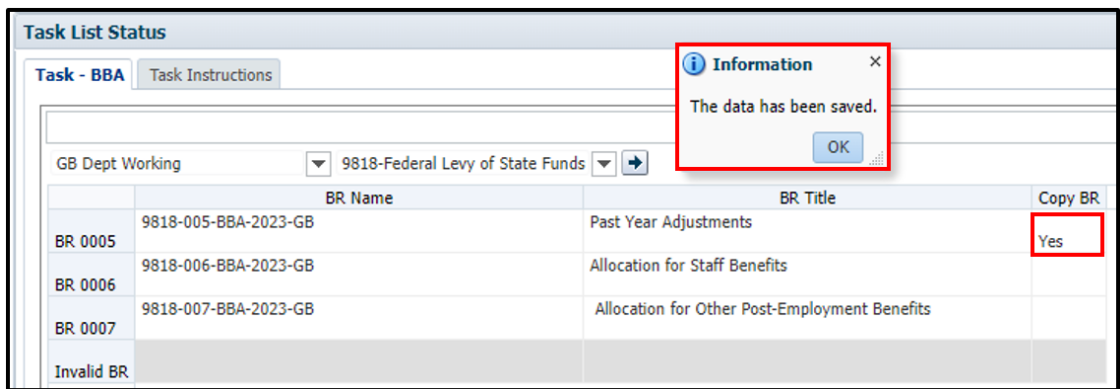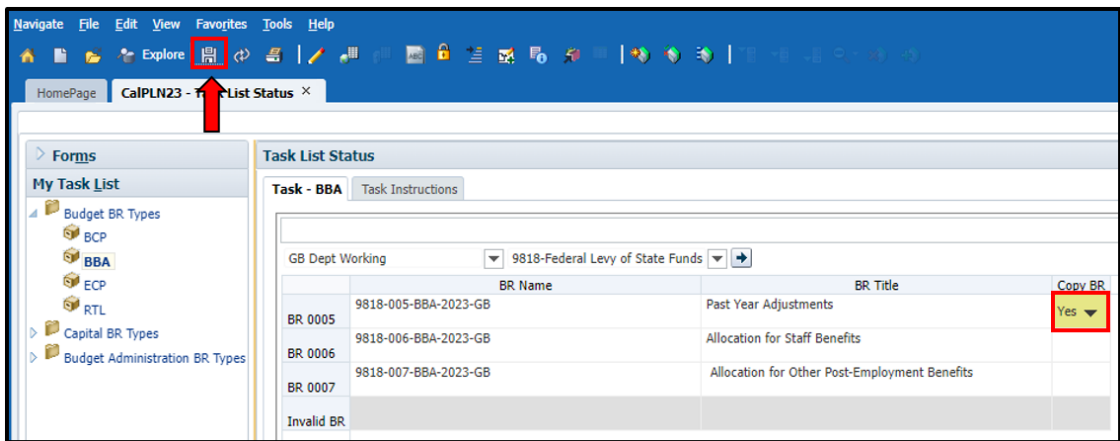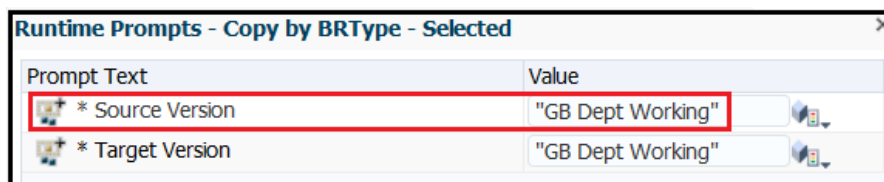

Step 14: Right-click anywhere on the page. A menu will show as below. Select **Copy Selected BRs by BR Type**. A pop-up prompt will open.
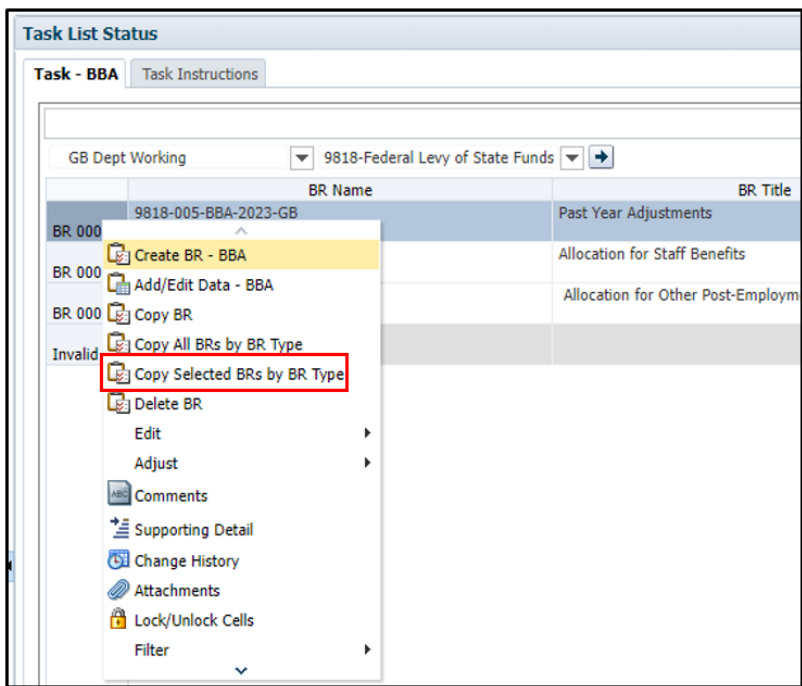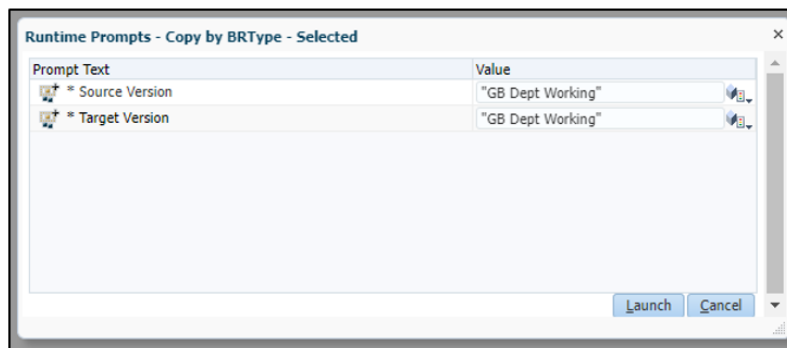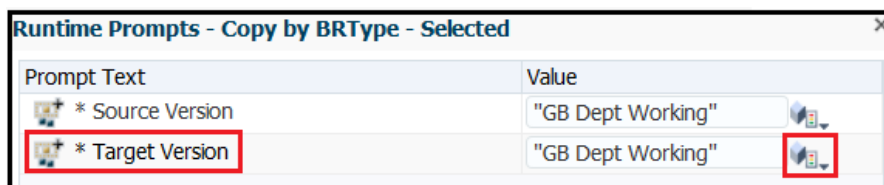
Step 15: The **Source Version** the BR is to be copied from should already be pre-populated with the version selected in Step 3. In this example, that version is GB Dept Working.
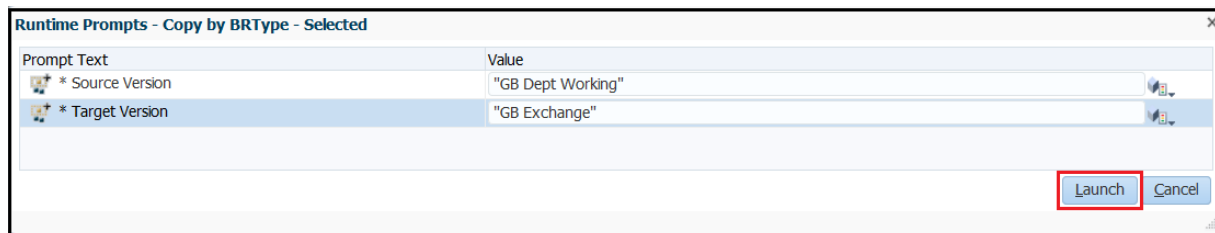

Step 16: Select a **Target Version** the BR is to be copied to, using the button to the right. Another pop-up prompt will open.

Step 17: Proceed to select the **Target Version** from the left "Member Name" selection pane using the **"Add"** button. The selected version will update accordingly to reflect in the right "Member Name" selection pane. Click **OK**.
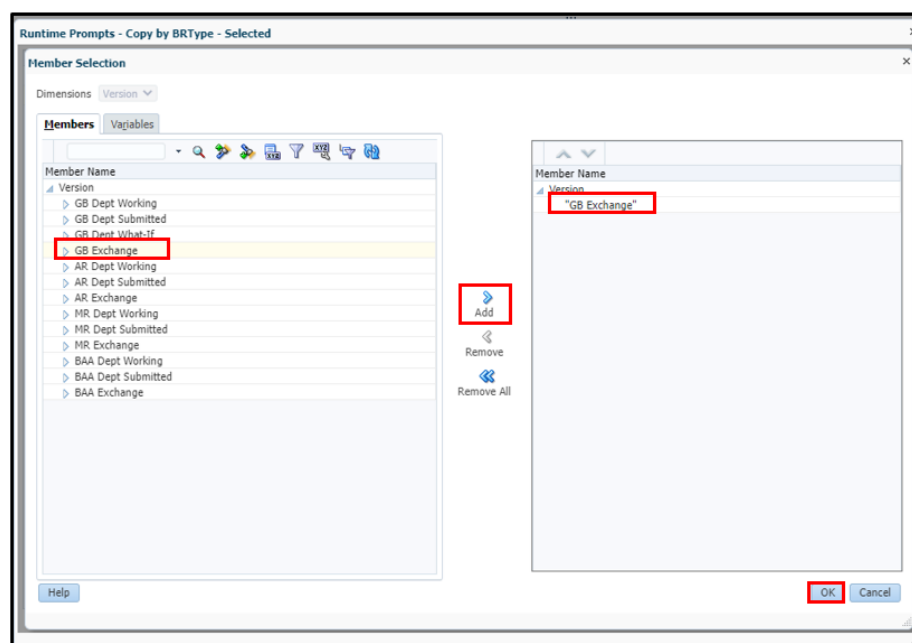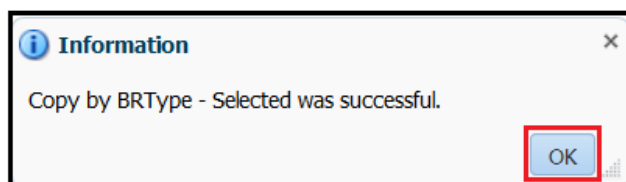
Step 18: After the parameters have been selected, click **Launch**. A prompt will pop-up confirming your copy job has successfully copied. Click **OK**.
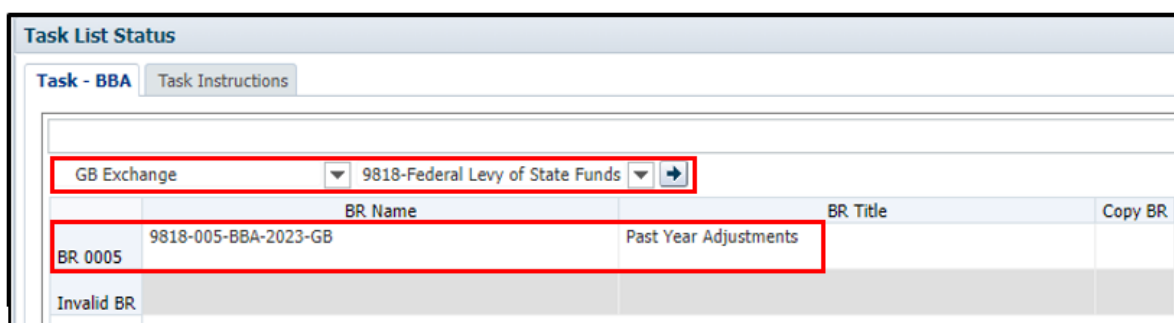
Step 19: Validate the BR has been copied. On the BR Listing page, select the POV—**Version** the BR was copied to and **BU**. Then click the "**GO**" arrow to proceed.

Congratulations. You have successfully copied 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