# How to Use the Validate by BR Form
By Department of Finance

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

Purpose: Provides instructions for viewing the "Validate by BR" form. This form can be used to assist users in validating data after input, as well as help users identify "orphan" data kicked out of Hyperion (e.g., when data has been uploaded via an upload template into Hyperion before a BR container has been created).

Step 1: On the Hyperion Homepage, under the Applications section, click on the **CalPLN*XX*** 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 2017-18 budget cycle, therefore we will choose CalPLN17.
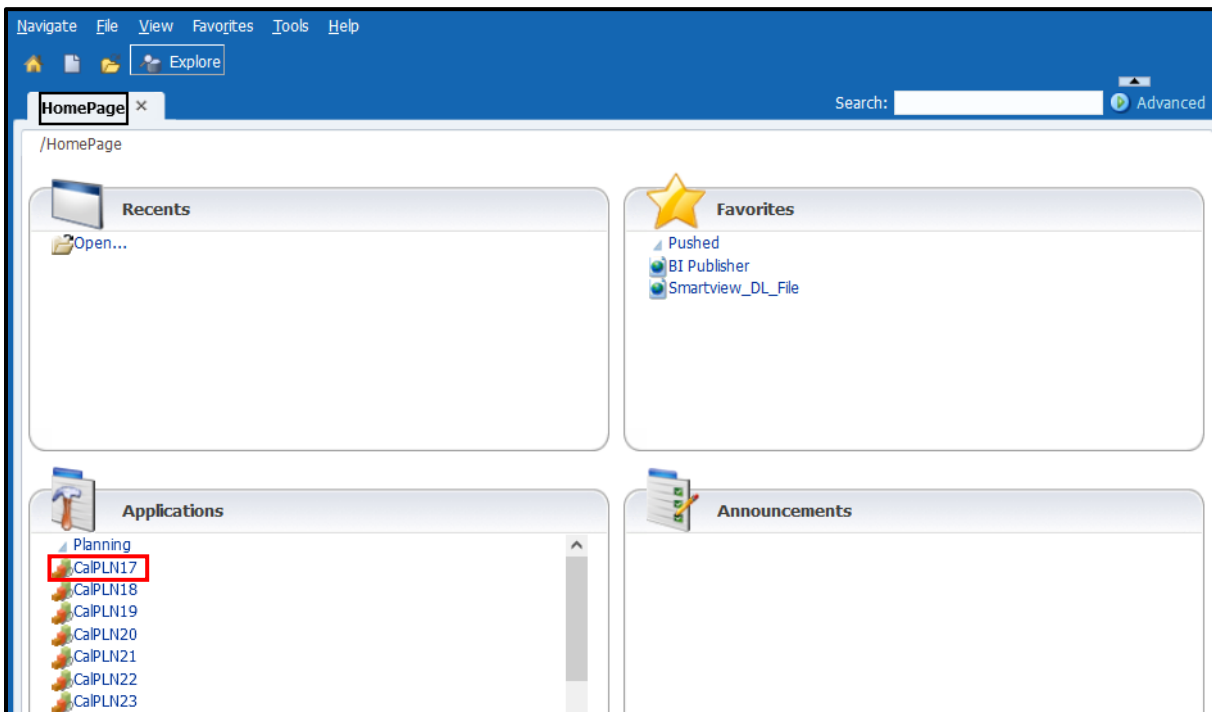
Step 2: Navigate to **Forms** from the left pane.
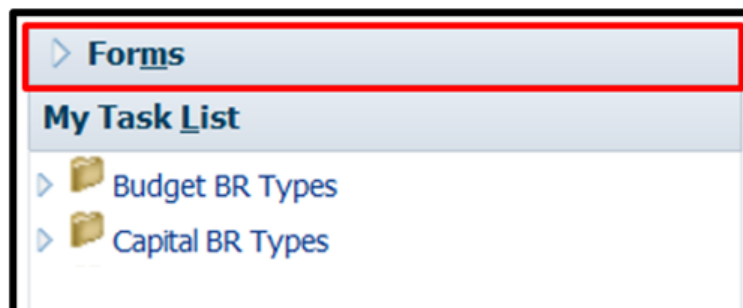
Step 3: Expand **Forms** and select **Department Budget Reports**.

Step 4: Select the **Validate by BR** form from the left pane.

Step 5: The **Validate by BR** form will open in the right pane.

Step 6: Select the point-of-view (POV) of the particular BR desired to view:

- **Version**
- **Business Unit (BU)**
- **Year Being Budgeted (YBB)** (e.g., use "2017-18" for the 2017-18 budget cycle)
- **Associated BR Number**
  - o The associated BR number can be found in the leftmost column on the BR listing page.


Step 7: Select the "**GO**" arrow ( ) to proceed with the selected POV.

Step 8: Expenditure and position data contained in the selected BR will display. This data includes the following data components:

- Item number
- Year of Enactment (ENY)
- Program
- Category code
- Expenditure data for PY, CY, and BY
  - o Request Amount
  - o Estimated Savings
  - o Estimated Carryover
  - o Budgetary Expenditure
- Position data for PY, CY, and BY
  - o From the Position Summary tab

Validate by BR

				Request Amount PY	Estimated Savings PY	Estimated Carryover PY	Budgetary Expenditure PY	Position PY
9818 001 0001	ENY 2017	9990-Unscheduled Items of Appropriation	5390900-Other Items of Expense - Miscellaneous					
	ENY 2016	9990-Unscheduled Items of Appropriation	5390900-Other Items of Expense - Miscellaneous					
	ENY 2015	9990-Unscheduled Items of Appropriation	5390900-Other Items of Expense - Miscellaneous	10,000	-2,000		8,000	

NOTE: If a BR contains a large amount of data, the data can be exported to Excel by navigating to **Tools → Export as Spreadsheet**
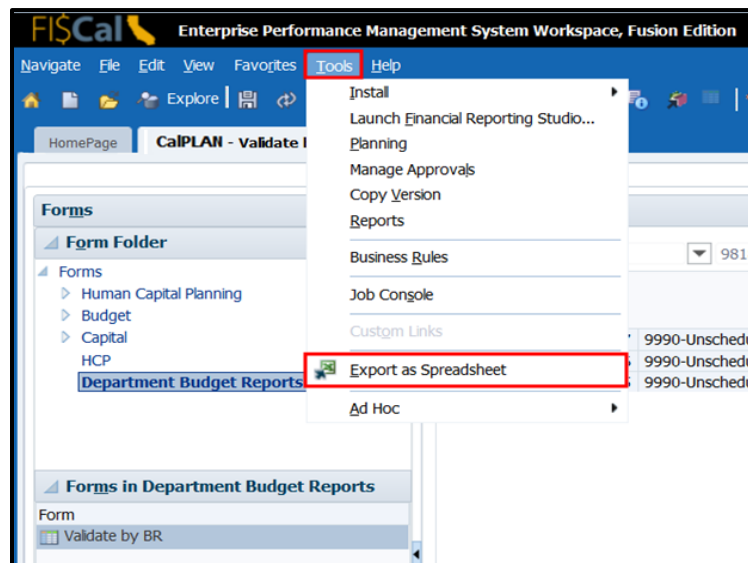
Who to Contact for Questions/Problems:

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