

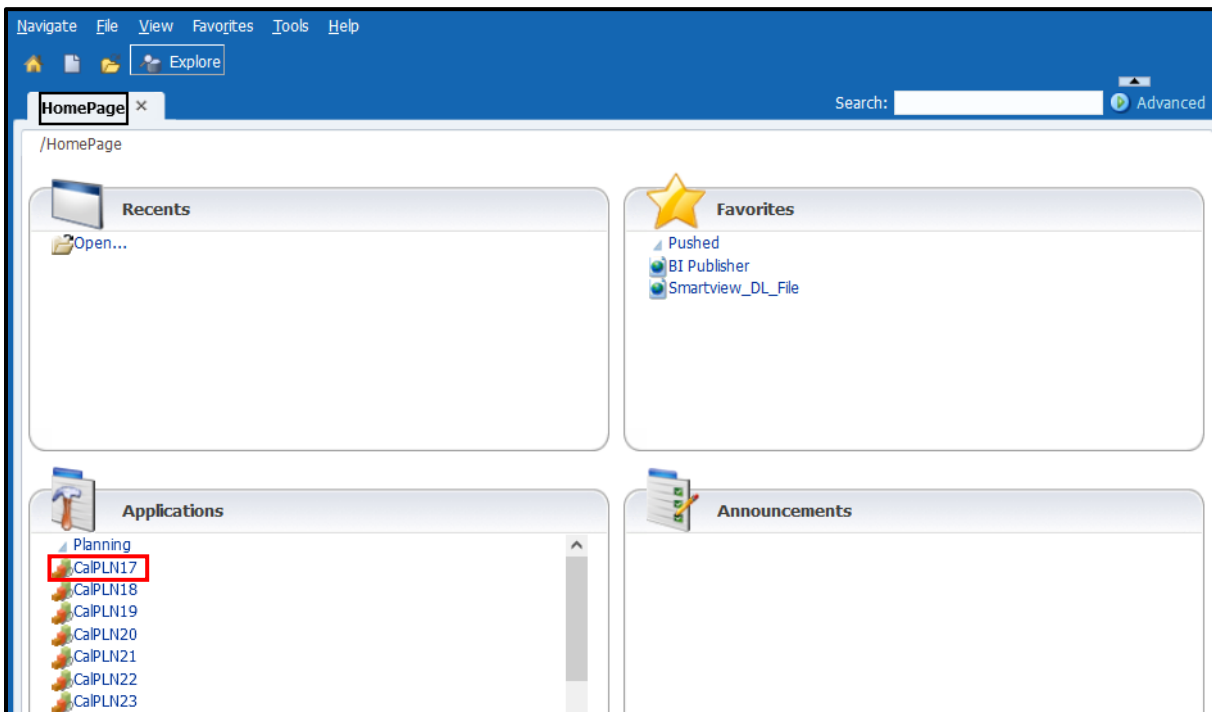
How to Use the Validate by BR Form By Department of Finance

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

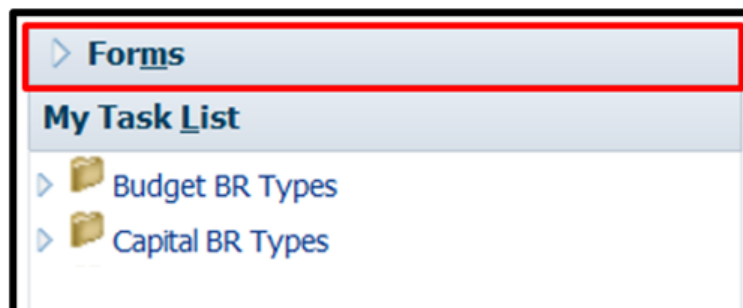
Purpose: Provides instructions for viewing the “Validate by BR” form. This form can be used to assist users in validating data after input, as well as help users identify “orphan” data kicked out of Hyperion (e.g., when data has been uploaded via an upload template into Hyperion before a BR container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

Step 1: On the Hyperion Homepage, under the Applications section, click on the **CalPLNXX** 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**.

The screenshot shows a software interface with a 'Forms' menu. Under the 'Form Folder' section, the 'Forms' option is highlighted with a red box. Below it, a list of sub-items is shown: 'Human Capital Planning', 'Budget', 'Capital', 'HCP', and 'Department Budget Reports'. The 'Department Budget Reports' item is also highlighted with a red box.

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

The screenshot shows the same software interface. The 'Forms' menu is expanded, and the 'Department Budget Reports' item is highlighted with a blue box. Below this, a section titled 'Forms in Department Budget Reports' is visible. Under the 'Form' sub-section, the 'Validate by BR' item is highlighted with a red box.

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

The screenshot shows the 'Validate by BR' form open in the right pane. The form has a header section with dropdown menus for 'MR Dept Working', '9818-Federal Levy of State Funds', '2017-18', and 'BR 0006'. Below this is a table with budget data. The table has columns for 'Request Amount PY' and 'Estimated Savings PY'. The data is as follows:

| | | | | | Request Amount PY | Estimated Savings 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 |

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**
 - The associated BR number can be found in the leftmost column on the BR listing page.

| BR Name | BR Title |
|----------------------|---|
| 9818-002-BBA-2017-GB | Past Year Adjustments |
| 9818-003-BBA-2017-GB | Allocation for Staff Benefits |
| 9818-004-BBA-2017-GB | Section 3.0 Pension Contribution Adjustment |

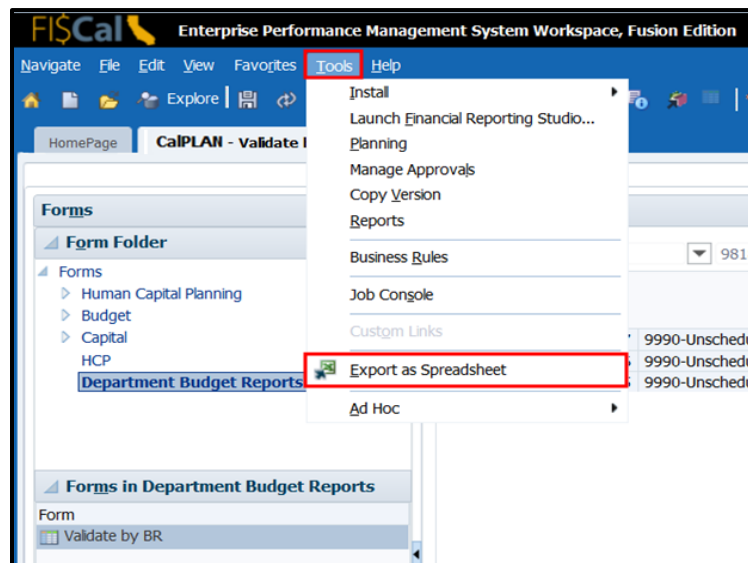
Step 7: Select the “GO” arrow () to proceed with the selected POV.

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
 - Request Amount
 - Estimated Savings
 - Estimated Carryover
 - Budgetary Expenditure
- Position data for PY, CY, and BY
 - From the Position Summary tab

| Validate by BR | | | | | |
|-----------------|----------|---|--|----------------------|---|
| MR Dept Working | | 9818-Federal Levy of State Funds | 2017-18 | BR 0006 |  |
| | | | | | |
| | | | Request Amount PY | Estimated Savings PY | Estimated Carryover 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