

Uploading Budget Templates in Hyperion

Version: 10.0 Updated: 02/13/2025

Purpose

This Supplemental Job Aid provides instructions to upload a Budget Request (BR).

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Target Audience

All FI\$Cal roles with write access to the Hyperion Planning Application.

Key Points

Note that using upload templates is likely most effective or efficient when a user has more than 20 lines of budget data to enter for a budget request (such as multiple appropriations, programs, fund sources, or categories of spending data). The four BR types for which upload templates can be used are: Baseline Budget Adjustment (BBA),

Budget Change Proposal (BCP), Enrollment, Caseload, and Population (ECP), and Revenues, Transfers, and Loans (RTL). There are separate and distinct upload templates available from your respective Department of Finance (Finance) Budget Analyst or by subscribing to Finance's Budget Operations mailing list for each of these BR types (exception: ECP BRs use the BCP upload template).

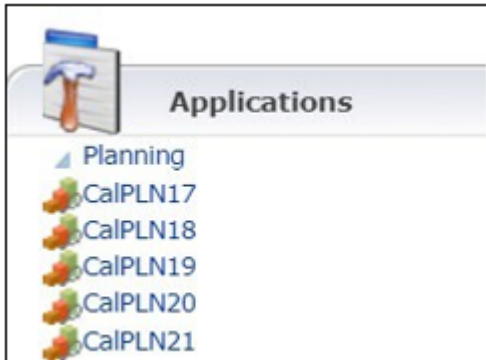
To subscribe to the Budget Operations mailing list, register here:

<https://dof.ca.gov/departments-mailing-lists/>.

The following general steps need to be performed to upload budget data into an individual BR in Hyperion using an upload template.

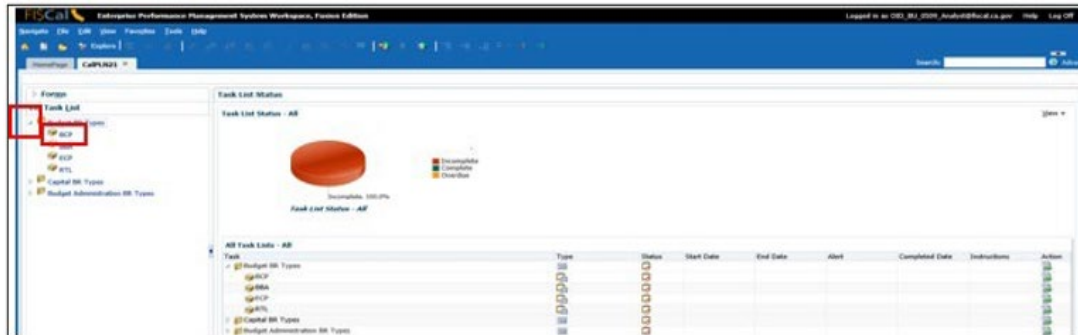
Create a BR in Hyperion (CalPLNXX) where the data will be uploaded

CalPLN21 is used when building the 2021-22 Budget, CalPLN22 is used when building the 2022-23 Budget, and CalPLN23 is used when building the 2023-24 Budget, etc. In this example, we will be using **CalPLN21** as this BCP is proposed to be included in the 2021-22 Budget.

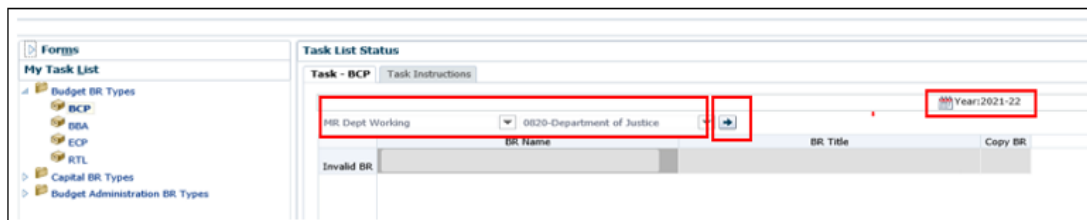
Steps	Description
1	<p>Log into Hyperion and click on CalPLNXX under the Applications section of the Hyperion Homepage. The selected CalPLNXX application will open in a new tab.</p> 

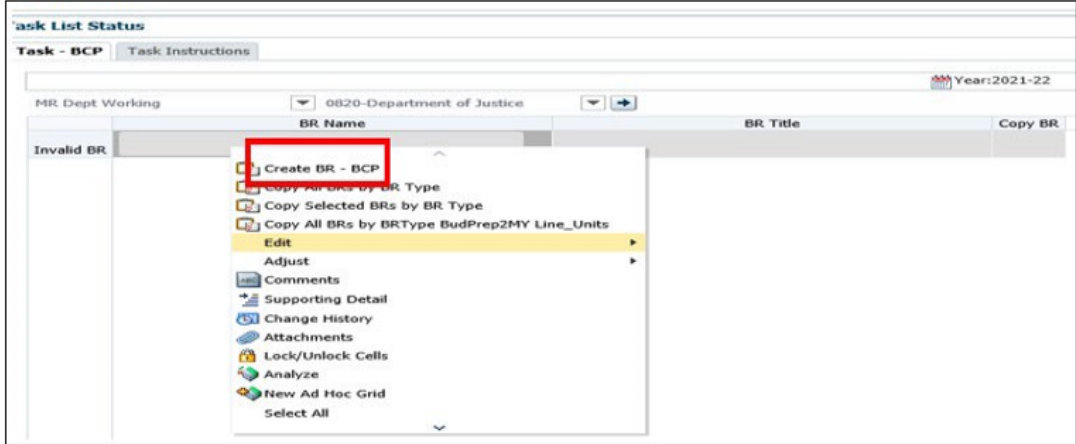
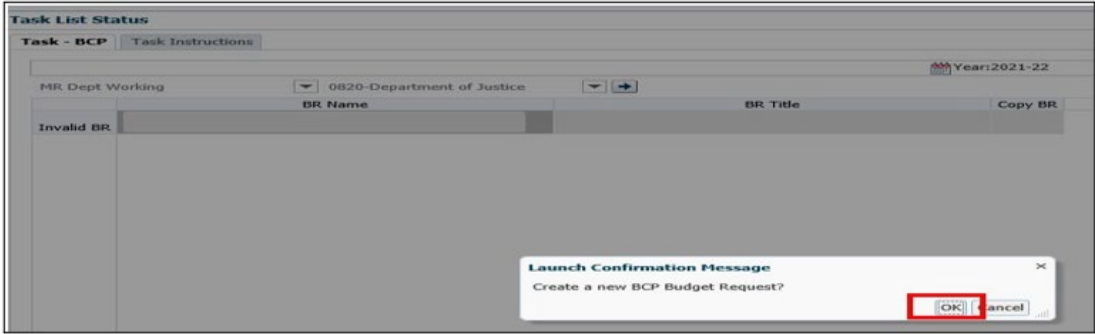
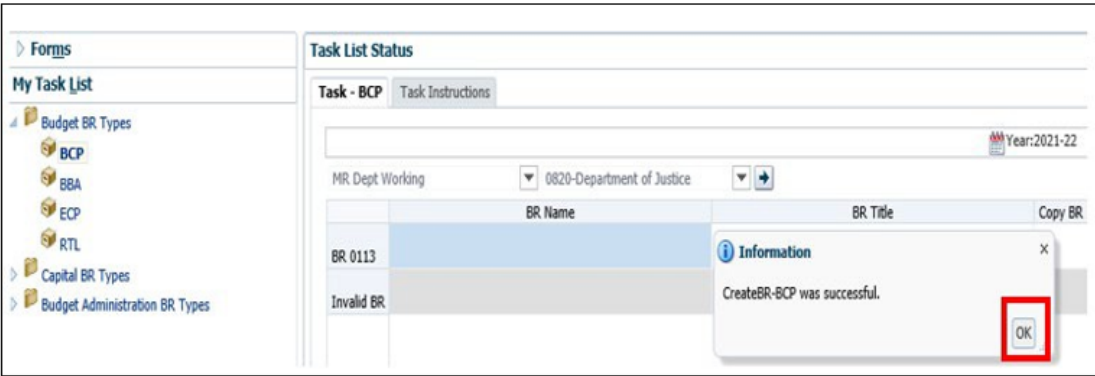
Steps	Description
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|---|---|
| 2 | Under My Task List, click on the Budget BR Types arrow to expand the list of options. Then click on the BCP option. (In this example, we use the BCP BR type. However, users must select the appropriate BR type, such as BBA, ECP, or RTL, etc., as applicable.) |
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| 3 | Select the appropriate Version and Entity from the drop-down menus and verify that the default fiscal year (located just above and to the right of the Entity drop-down box) reflects the Budget being built. In this example, we selected MR Dept Working for Version , 0820-Department of Justice for Entity , and verified the fiscal year to be 2021-22 for Year (default). Click the Go arrow button (the arrow sign directly to the right of the Entity name drop-down box). |
|---|--|



Steps	Description
4	<p>Right click on the white area under the BR Name column. A drop-down box containing several clickable options will appear. Click on the Create BR - BCP option from the drop-down menu.</p> 
5	<p>A Launch Confirmation Message window will appear. Click “OK.”</p> 
6	<p>A second confirmation message window will appear stating the, “Create BR-BCP was successful.” Click “OK.” In this example, the new BCP BR created is identified as BR 0113.</p> 

Steps	Description
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| 7 | Click in the BR Name cell next to the BR 0113, then type in the BR Name (the BR Name must use a unique naming convention to post accurate detail in Hyperion.) and BR Title . Refer to the latest version of the “Budget Request Naming Convention in Hyperion” guide on Finance’s “FISCal Resources for Budget” website. In this example, we use “ 0820-113-BCP-2021-MR ” as the BR Name and “ Implementation of the ABC Project ” as the BR Title . Click the save icon (computer disk on the menu bar) and click “ OK ” on the pop-up message to confirm the data has been saved. |
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| 8 | Write down the unique BR identifier number . (It is a four-digit number, such as BR 0113 in the example shown below). This unique identifier number is needed to connect the upload template to the specific BR in Hyperion. |
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Obtain and populate the latest available Excel upload template (master file) from the Department of Finance

Finance distributes upload templates for a BCP, BBA, RTL, and ECP BR (Note: the BCP upload template is also used for an ECP BR) twice a year (after Governor's Budget [late January/early February] for the spring budget process and after Budget Enactment [late July/early August] for the fall budget development process) to the Budget Operations mailing list. To receive the latest upload templates, please sign up to receive emails from Finance's Budget Operations mailing list here:

<https://dof.ca.gov/department-mailing-lists/> or contact your respective Finance Budget Analyst.

In this example, we are creating a BCP BR therefore we will use the BCP Excel Upload Template workbook.

Steps	Description
1	<p>In Excel, open the BCP upload template file, navigate to the Budget Request Details tab and, populate the following requested information next to each field.</p> <ul style="list-style-type: none"> • Enter Budget Request Name: Enter the BR Name that corresponds to the BR created in Hyperion. In this example, we use "0820-113-BCP-2021-MR" as the BR Name. • Budget Request Title: Enter the BR Title that corresponds to the BR created in Hyperion. In this example, we use "Implementation of the ABC Project" as the BR Title. • Enter Request ID: Click in the blue cell next to the field and select the unique BR Identifier number that was noted when creating the BR in Hyperion. In this example, we use "BR 0113" as the Request ID. • Enter Version: Prepopulated field. Verify and change the version as appropriate if the prepopulated version does not correspond with the version the BR was created in. In this example, we use "MR Dept Working" as the Version. • Enter Year: Prepopulated field. Verify the year corresponds with the fiscal year of the Budget being built. In this example, we use "2021-22" as the Year. <p>Enter Entity: Click in the blue cell next to the field and select the appropriate entity. In this example, we use "0820-Department of Justice" as the Entity.</p>

Steps	Description
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Enter Budget Request Name	0820-113-BCP-2021-MR								
Budget Request Title	Implementation of the ABC Project								
Enter Request ID	BR 0113								
Enter Version	MR Dept Working								
Enter Year	2021-22								
Enter Entity	0820-Department of Justice								
<p>Cell Color Key:</p> <table border="1"> <tr> <td>Blue Cells:</td> <td>Must select value from the drop-down menu.</td> </tr> <tr> <td>Salmon Cells:</td> <td>Manual input. User must type the information, there is no drop-down menu.</td> </tr> <tr> <td>Purple Cells:</td> <td>Do not modify pre-populated values in these cells.</td> </tr> <tr> <td>White Cells:</td> <td>Update as necessary.</td> </tr> </table>		Blue Cells:	Must select value from the drop-down menu.	Salmon Cells:	Manual input. User must type the information, there is no drop-down menu.	Purple Cells:	Do not modify pre-populated values in these cells.	White Cells:	Update as necessary.
Blue Cells:	Must select value from the drop-down menu.								
Salmon Cells:	Manual input. User must type the information, there is no drop-down menu.								
Purple Cells:	Do not modify pre-populated values in these cells.								
White Cells:	Update as necessary.								
<p>Updated Date: JANUARY 2021</p>									
<p>< > Checklist Checklist Detail Summary Budget Request Details Workl</p>									

Steps | Description

Revenue Request BY - Estimated Income BY - Estimated Consumption BY - Request Amount BY - Request Amount BY							
0820 001 0001	ENY 2021	0435010-Civil Law	5320000-Earnings - Permanent Civil Service Emplo	200,000			200,000
0820 012 0001	ENY 2021	0435028-Public Rights	5320000-Earnings - Permanent Civil Service Emplo	200,000			200,000
0820 001 0067	ENY 2021	0435028-Public Rights	5320000-Earnings - Permanent Civil Service Emplo	200,000			200,000
0820 001 0001	ENY 2021	0435010-Civil Law	5350150-Dental Insurance	10,000			10,000
0820 012 0001	ENY 2021	0435028-Public Rights	5350150-Dental Insurance	10,000			10,000
0820 001 0067	ENY 2021	0435028-Public Rights	5350150-Dental Insurance	10,000			10,000
0820 001 0001	ENY 2021	0435010-Civil Law	5350350-Health Insurance	20,000			20,000
0820 012 0001	ENY 2021	0435028-Public Rights	5350350-Health Insurance	20,000			20,000
0820 001 0067	ENY 2021	0435028-Public Rights	5350350-Health Insurance	20,000			20,000
0820 001 0001	ENY 2021	0435010-Civil Law	5350450-Medicare Taxation	15,000			15,000
0820 012 0001	ENY 2021	0435028-Public Rights	5350450-Medicare Taxation	15,000			15,000
0820 001 0067	ENY 2021	0435028-Public Rights	5350450-Medicare Taxation	15,000			15,000
0820 001 0001	ENY 2021	0435010-Civil Law	5350500-OASDI	15,000			15,000
0820 012 0001	ENY 2021	0435028-Public Rights	5350500-OASDI	15,000			15,000
0820 001 0067	ENY 2021	0435028-Public Rights	5350500-OASDI	15,000			15,000
0820 001 0001	ENY 2021	0435010-Civil Law	5350750-Vision Care	5,000			5,000
0820 012 0001	ENY 2021	0435028-Public Rights	5350750-Vision Care	5,000			5,000
0820 001 0067	ENY 2021	0435028-Public Rights	5350750-Vision Care	5,000			5,000
0820 001 0001	ENY 2021	0435010-Civil Law	5320490-Travel - In State - Other	50,000			50,000
0820 012 0001	ENY 2021	0435028-Public Rights	5320490-Travel - In State - Other	50,000			50,000
0820 001 0067	ENY 2021	0435028-Public Rights	5320490-Travel - In State - Other	50,000			50,000
0820 001 0001	ENY 2021	0435010-Civil Law	5368115-Office Equipment	12,000			12,000
0820 012 0001	ENY 2021	0435028-Public Rights	5368115-Office Equipment	12,000			12,000
0820 001 0067	ENY 2021	0435028-Public Rights	5368115-Office Equipment	12,000			12,000

- Navigate to the **Checklist** tab to verify all crossties and critical issues checklist cells have no error messages. If there are error messages, they will display red and require corrections before proceeding. In this example, "Fix Duplicate Rows" is the error identified. To address errors, review the data in the problem areas identified and make the necessary corrections.

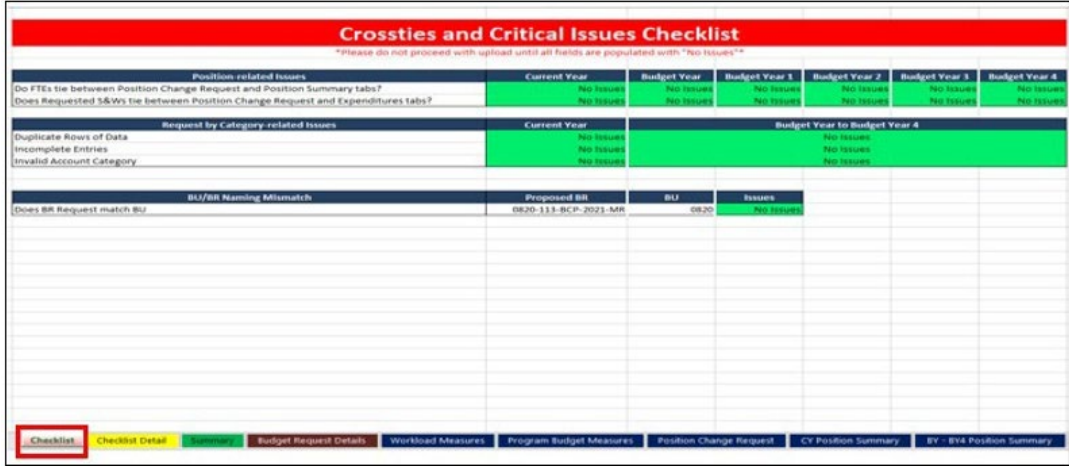
Crossties and Critical Issues Checklist						
*Please do not proceed with upload until all fields are populated with "No Issues"						
Position-related Issues		Current Year	Budget Year	Budget Year 1	Budget Year 2	Budget Year 3
Do FTEs tie between Position Change Request and Position Summary tabs?		No Issues	No Issues	No Issues	No Issues	No Issues
Does Requested S&Ws tie between Position Change Request and Expenditures tabs?		No Issues	No Issues	No Issues	No Issues	No Issues
Request by Category-related Issues		Current Year	Budget Year 1			
Duplicate Rows of Data		No Issues	Fix Duplicate Rows			
Incomplete Entries		No Issues	No Issues			
Invalid Account Category		No Issues	No Issues			
BU/Bit Naming Mismatch		Proposed Bit	Bit	Issues		
Does Bit Request match BU		0820-119-BCP-2021-MR	0820	No Issues		

Steps | Description

- 4 Navigate to the **Checklist Detail** tab to identify where the errors exist in the upload template. In this example, there are **duplicate entries on rows 31 and 32** of the **BY-BY4 Expenditures** tab. Correct any errors identified.

AC	AJ	AK	AX	AY	BB	BC
BY-BY4 Expenditures Tab						
Fix Invalids (CY Expenditures Tab)	Item (BY-BY4 Expenditures Tab)	Row Number (BY-BY4 Expenditures Tab)	Fix Duplicates (BY-BY4 Expenditures Tab)	Fix Incompletes (BY-BY4 Expenditures Tab)	Fix Invalids (BY-BY4 Expenditures Tab)	
	0820 001 0001	Row 11				
	0820 012 0001	Row 12				
	0820 001 0567	Row 13				
	0820 001 0001	Row 14				
	0820 012 0001	Row 15				
	0820 001 0567	Row 16				
	0820 001 0001	Row 17				
	0820 012 0001	Row 18				
	0820 001 0567	Row 19				
	0820 001 0001	Row 20				
	0820 012 0001	Row 21				
	0820 001 0567	Row 22				
	0820 001 0001	Row 23				
	0820 012 0001	Row 24				
	0820 001 0567	Row 25				
	0820 001 0001	Row 26				
	0820 012 0001	Row 27				
	0820 001 0567	Row 28				
	0820 001 0001	Row 29				
	0820 012 0001	Row 30				
	0820 001 0567	Row 31				
	0820 001 0567	Row 32				
		Row 33				
		Row 34				
		Row 35				
		Row 36				
		Row 37				
		Row 38				
		Row 39				
			Fix Duplicate Entry Fix Duplicate Entry			

Request Amount BY Estimated Savings BY Estimated Carryover BY Request Amount BY1 Request Amount BY2 Request Amount BY3 Request Amount BY4									
0820 001 0001	ENR 2021	0435010-Civil Law	5100000-Earnings - Permanent Civil Service Emplo	200,000			200,000	200,000	200,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100000-Earnings - Permanent Civil Service Emplo	200,000			200,000	200,000	200,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100000-Earnings - Permanent Civil Service Emplo	200,000			200,000	200,000	200,000
0820 001 0001	ENR 2021	0435010-Civil Law	5100150-Dental Insurance	10,000			10,000	10,000	10,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100150-Dental Insurance	10,000			10,000	10,000	10,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100150-Dental Insurance	10,000			10,000	10,000	10,000
0820 001 0001	ENR 2021	0435010-Civil Law	5100350-Health Insurance	20,000			20,000	20,000	20,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100350-Health Insurance	20,000			20,000	20,000	20,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100350-Health Insurance	20,000			20,000	20,000	20,000
0820 001 0001	ENR 2021	0435010-Civil Law	5100450-Medicare Taxation	15,000			15,000	15,000	15,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100450-Medicare Taxation	15,000			15,000	15,000	15,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100450-Medicare Taxation	15,000			15,000	15,000	15,000
0820 001 0001	ENR 2021	0435010-Civil Law	5100500-CASO1	15,000			15,000	15,000	15,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100500-CASO1	15,000			15,000	15,000	15,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100500-CASO1	15,000			15,000	15,000	15,000
0820 001 0001	ENR 2021	0435010-Civil Law	5100750-Vision Care	5,000			5,000	5,000	5,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100750-Vision Care	5,000			5,000	5,000	5,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100750-Vision Care	5,000			5,000	5,000	5,000
0820 001 0001	ENR 2021	0435010-Civil Law	5100480-Travel - In State - Other	50,000			50,000	50,000	50,000
0820 012 0001	ENR 2021	0435020-Public Rights	5100480-Travel - In State - Other	50,000			50,000	50,000	50,000
0820 001 0567	ENR 2021	0435020-Public Rights	5100480-Travel - In State - Other	50,000			50,000	50,000	50,000
0820 001 0001	ENR 2021	0435010-Civil Law	5068115-Office Equipment	12,000			12,000	12,000	12,000
0820 012 0001	ENR 2021	0435020-Public Rights	5068115-Office Equipment	12,000			12,000	12,000	12,000
0820 001 0567	ENR 2021	0435020-Public Rights	5068115-Office Equipment	12,000			12,000	12,000	12,000

Steps	Description
5	<p>Once errors are corrected, navigate back to the Checklist tab to verify and ensure all the crossties and critical issues checklist cells have been addressed and are all green and read, “No Issues.”</p> 
6	<p>Use the “BEFORE Upload Template Checklist—Departments” to ensure the BR is properly created in Hyperion and the upload template is populated correctly. Refer to the latest version of the “Before and After Upload Template Checklists” on Finance’s “FI\$Cal Resources for Budget” website.</p>

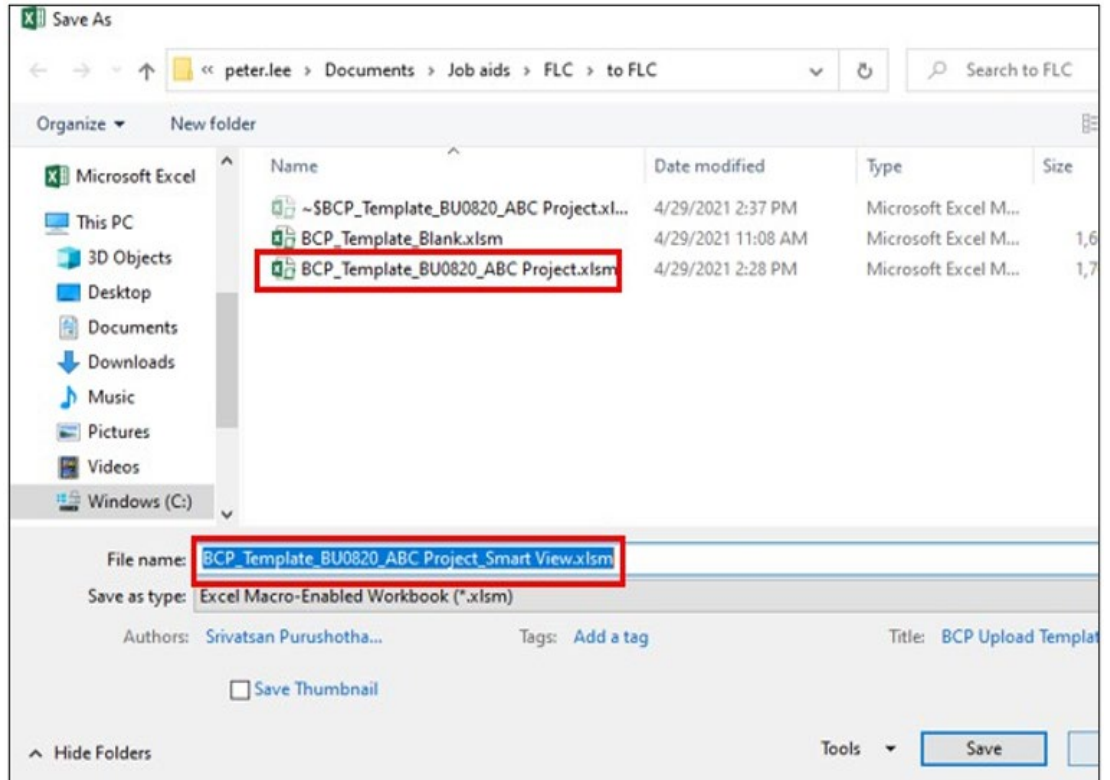
Save an extra copy of the populated Excel upload template (Smart View file) to use to connect and upload the data to Hyperion

This extra copy labeled the “Smart View” version of the upload template will be used to connect to Hyperion and upload the data to the BR created in the previous steps above.

Steps	Description
1	<p>Save an extra copy of the upload template on your computer. Recommend renaming the file to include the term, “Smart View” to the end of the file name.</p> <p>For example, if the original Excel file is named, “BCP_Template_BU0820_ABC Project”, this extra copy could be named, “BCP_Template_BU0820_ABC Project_Smart View.”</p>

Steps	Description
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	<p>Note: This step is critical because if the original Excel template file is connected to Hyperion, all the populated data will be lost and not be retrievable. The original/master version will have the source data, and the Smart View version will be the file connected to Hyperion.</p>
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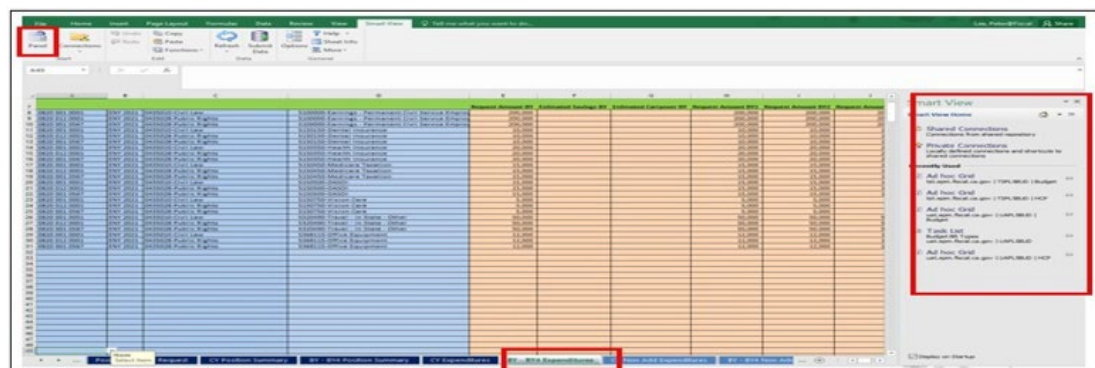
2	Open the Smart View version of the upload template and navigate to the
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Steps	Description
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BY- BY4 Expenditures tab.

					Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	1000000-Earnings - Permanent Civil Service Englis	200,000			200,000	200,000	200,000	200,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	1000000-Earnings - Permanent Civil Service Englis	200,000			200,000	200,000	200,000	200,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	1000000-Earnings - Permanent Civil Service Englis	200,000			200,000	200,000	200,000	200,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5105150-Dental Insurance	10,000			10,000	10,000	10,000	10,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5105150-Dental Insurance	10,000			10,000	10,000	10,000	10,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5105150-Dental Insurance	10,000			10,000	10,000	10,000	10,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5105750-Health Insurance	20,000			20,000	20,000	20,000	20,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5105750-Health Insurance	20,000			20,000	20,000	20,000	20,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5105750-Health Insurance	20,000			20,000	20,000	20,000	20,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5104450-Medicare Taxation	15,000			15,000	15,000	15,000	15,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5104450-Medicare Taxation	15,000			15,000	15,000	15,000	15,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5104450-Medicare Taxation	15,000			15,000	15,000	15,000	15,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5104500-CASDI	15,000			15,000	15,000	15,000	15,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5104500-CASDI	15,000			15,000	15,000	15,000	15,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5104500-CASDI	15,000			15,000	15,000	15,000	15,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5105750-Vision Care	5,000			5,000	5,000	5,000	5,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5105750-Vision Care	5,000			5,000	5,000	5,000	5,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5105750-Vision Care	5,000			5,000	5,000	5,000	5,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5102400-Travel - in State - Other	50,000			50,000	50,000	50,000	50,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5102400-Travel - in State - Other	50,000			50,000	50,000	50,000	50,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5102400-Travel - in State - Other	50,000			50,000	50,000	50,000	50,000
0620-001-0001	FNKY-2021	04/01/2020-Civil Law	1	5108115-Office Equipment	12,000			12,000	12,000	12,000	12,000
0620-012-0001	FNKY-2021	04/01/2020-Public Rights	1	5108115-Office Equipment	12,000			12,000	12,000	12,000	12,000
0620-001-0147	FNKY-2021	04/01/2020-Public Rights	1	5108115-Office Equipment	12,000			12,000	12,000	12,000	12,000

- | | |
|---|---|
| 3 | From the Excel toolbar, click the Smart View ribbon tab and then select Panel . A Smart View panel will appear on the right-hand side of the document. |
|---|---|



- | | |
|---|---|
| 4 | Under the Smart View panel, click on Shared Connections . |
|---|---|

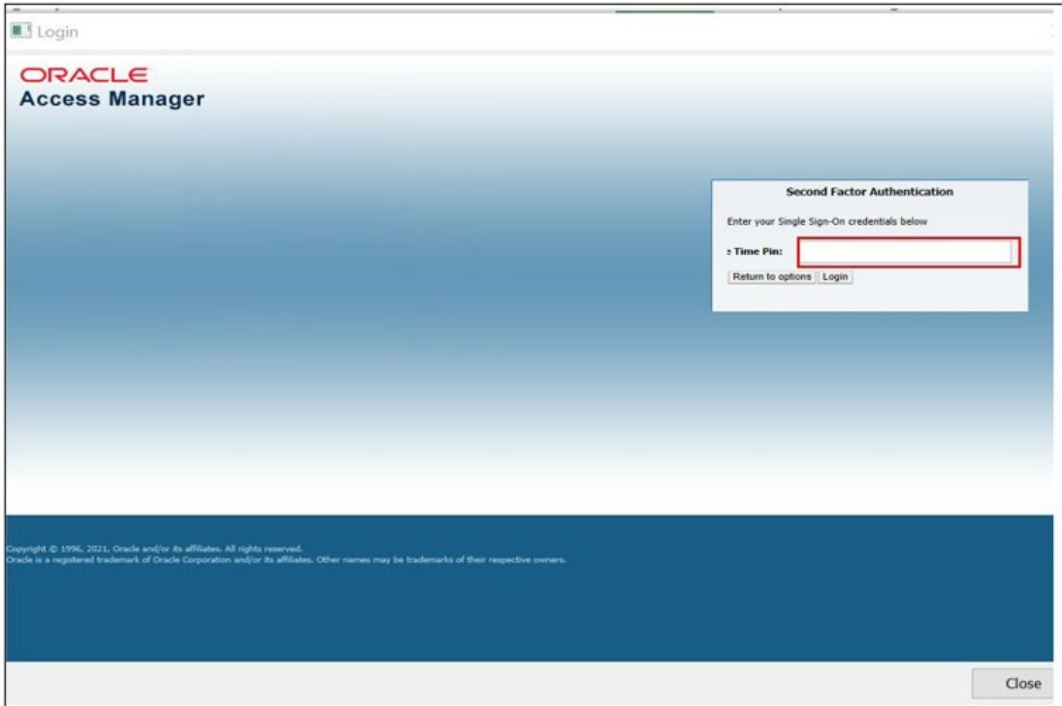
Steps | Description


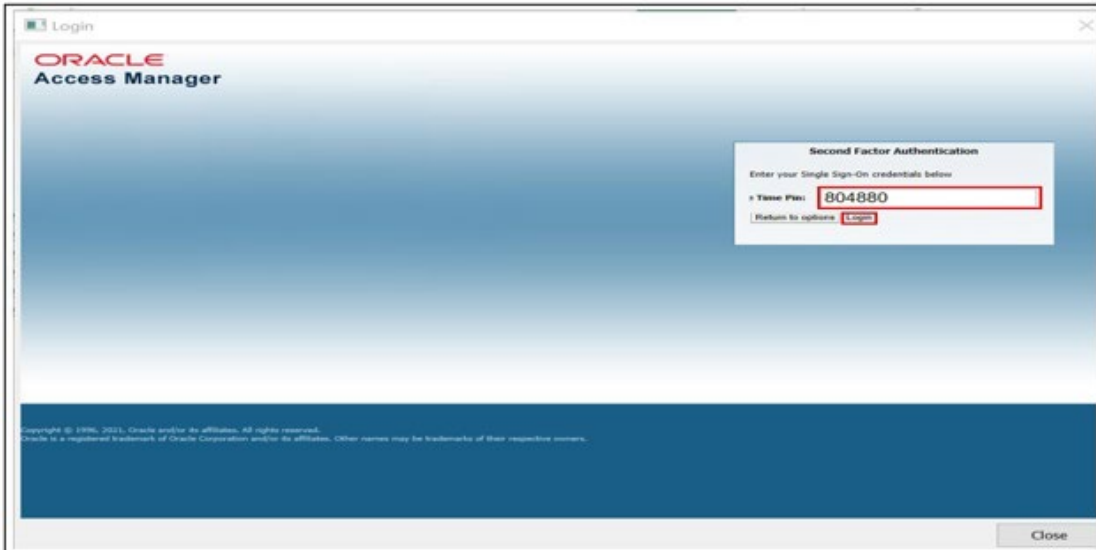
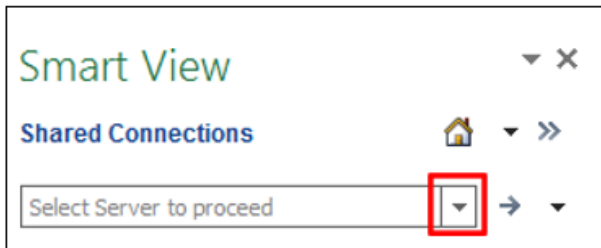
The screenshot displays the FI\$Cal application interface. On the left, a spreadsheet titled "23-24 Fall/Late(BY - BY4 Expenditures)" is visible. The spreadsheet has columns labeled C, D, E, F, and G. Column E is titled "Request Amount BY" and contains values ranging from 200,000 to 5,000. Column F is titled "Estimated Savings BY" and contains values ranging from 20,000 to 5,000. Column G is titled "Estimated Carryover BY" and contains values ranging from 20,000 to 5,000. The rows are categorized by "Request" and "Line Item". On the right, a "Smart View" sidebar is open, showing a list of "Shared Connections" and "Recently Used" connections. A red box highlights the "Shared Connections" section.

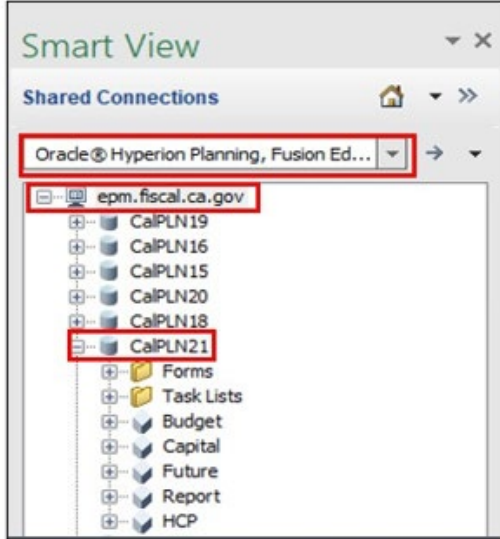
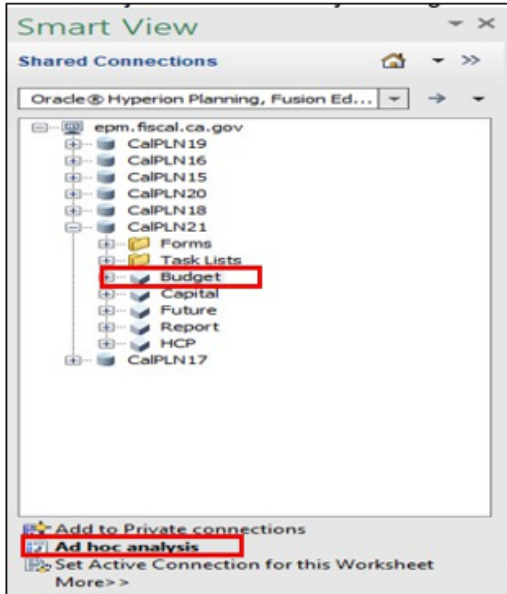
Request	Line Item	Request Amount BY	Estimated Savings BY	Estimated Carryover BY
0415019-Civil Law	5130000-Earnings - Permanent Civil Service Employees	200,000		
0415028-Public Rights	5130000-Earnings - Permanent Civil Service Employees	200,000		
0415028-Public Rights	5130000-Earnings - Permanent Civil Service Employees	200,000		
0415019-Civil Law	5150150-Dental Insurance	30,000		
0415028-Public Rights	5150150-Dental Insurance	30,000		
0415028-Public Rights	5150150-Dental Insurance	30,000		
0415019-Civil Law	5150150-Health Insurance	20,000		
0415028-Public Rights	5150150-Health Insurance	20,000		
0415028-Public Rights	5150150-Health Insurance	20,000		
0415019-Civil Law	5150450-Medicare Taxation	25,000		
0415028-Public Rights	5150450-Medicare Taxation	25,000		
0415019-Civil Law	5150500-OASDI	25,000		
0415028-Public Rights	5150500-OASDI	25,000		
0415028-Public Rights	5150500-OASDI	25,000		
0415019-Civil Law	5150750-Vision Care	5,000		
0415028-Public Rights	5150750-Vision Care	5,000		
0415019-Civil Law	5150750-Vision Care	5,000		

- When prompted, read and review FI\$Cal's system use and privacy policy and click **Agree**. Then enter your **FI\$Cal username and password** and click **Login**.

The screenshot shows the FI\$Cal Login window. On the left, there is a section titled "I agree to the Financial Information System for California's System Use and Privacy Policy". Below this title, there is a paragraph of text explaining the system's purpose and the user's responsibility. At the bottom of this section, there is a red box containing the word "Agree". On the right, there is a "Welcome" section with the text "Enter your Single Sign-On credentials below". Below this text, there are two input fields: "Username:" and "Password:". A red box highlights the "Login" button. At the bottom of the window, there is a "Close" button.

Steps	Description
	<p>If unable to log in, please confirm your FI\$Cal username and password and verify your Excel Smart View settings are configured properly by referring to the latest version of the “FISCal.079 - Configuring Microsoft Excel Smart View Settings for Hyperion and Single Sign-on” job aid.</p> <p>Access the job aid by navigating to the FI\$Cal ServiceNow login page, enter your FI\$Cal username and click “Submit.” You will be redirected to the FI\$Cal login page, enter your FI\$Cal username, password, click “Login”, enter the one-time pin (OTP) received, and click “Login.” Then select the “Knowledge” icon and using the Search field enter “Smart View settings” and select the “FISCal.079 - Configure Microsoft Excel Smart View Settings for Hyperion” job aid from the search results. Follow the steps outlined in the job aid to ensure Smart View is properly configured.</p> <p>Note: In the Smart View Options Advanced General settings, please ensure the Shared Connections URL address is: https://epm.fiscal.ca.gov/workspace/SmartViewProviders</p>
6	<p>Upon successful login, a Second Factor Authentication prompt opens and requests a one-time pin (OTP) verification code be entered.</p>  <p>The screenshot shows a web browser window titled 'Login' with the Oracle Access Manager logo. A 'Second Factor Authentication' dialog box is displayed, prompting the user to 'Enter your Single Sign-On credentials below'. It includes a 'Time Pin' input field and buttons for 'Return to options' and 'Login'. At the bottom of the window, there is a 'Close' button.</p>

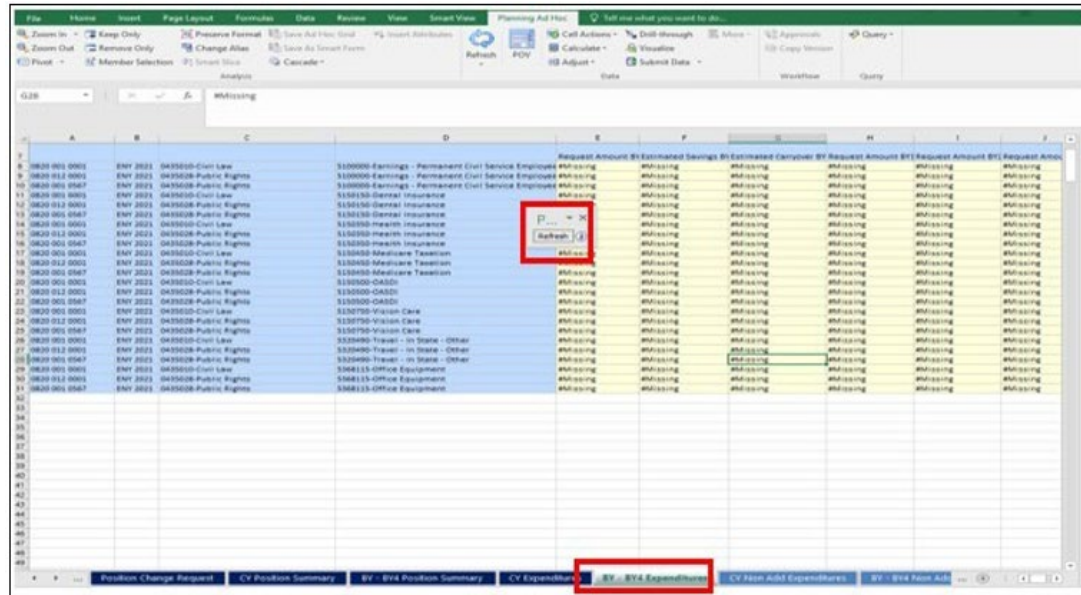
Steps	Description
7	<p>The OTP verification code will be sent to the email address associated with your FI\$Cal account. Check your email and note the OTP verification code.</p>  <p>The screenshot shows an email from 'Administrator <no-reply@fiscal.ca.gov>' with the subject 'One Time Pin'. The body text says 'Please use 804880 as a One Time Pin to access the requested resource.' The code '804880' is highlighted with a red box.</p>
8	<p>Enter the OTP verification code noted in the previous step. Click Login.</p>  <p>The screenshot shows the 'Oracle Access Manager' login page. A 'Second Factor Authentication' dialog box is displayed, asking for the 'Time Pin'. The code '804880' is entered in the field, and the 'Login' button is highlighted with a red box.</p>
9	<p>After logging in, navigate to the Smart View panel on the right side of the document and click the “Select Server to proceed” drop-down arrow.</p>  <p>The screenshot shows the 'Smart View' panel. Under the 'Shared Connections' section, there is a text box labeled 'Select Server to proceed' with a drop-down arrow icon next to it. The drop-down arrow is highlighted with a red box.</p>

Steps	Description
10	<p>Choose the “Oracle® Hyperion Planning, Fusion Edition” option, expand the “epm.fiscal.ca.gov” option (use the (+) button), and expand the “CalPLN21” option (use the (+) button).</p> 
11	<p>Double left click on the “Budget” option and then click on the “Ad hoc analysis” option at the bottom of the panel. Each tab in the upload template containing data needs to be connected individually to Smart View by clicking the Ad hoc analysis option.</p> 

Steps | Description

- 12 Close the pop-up refresh window by clicking the “X” in the top right-hand corner.

Note: “#Missing” appears in the data cells, which means that the Smart View template is connected to Hyperion and no data is in the BR, yet.



Copy and paste budget data from the master template file (the original file with populated source data) into the Smart View template file and upload to Hyperion

Each tab of the upload template containing data needs to be uploaded individually to Hyperion as shown in steps 1-4 below.

Steps	Description
1	Open the master template file (the original template file populated and saved with the source data), navigate to the BY-BY4 Expenditures tab, and copy all the dollar values (in this case, from cells E8 to K31).

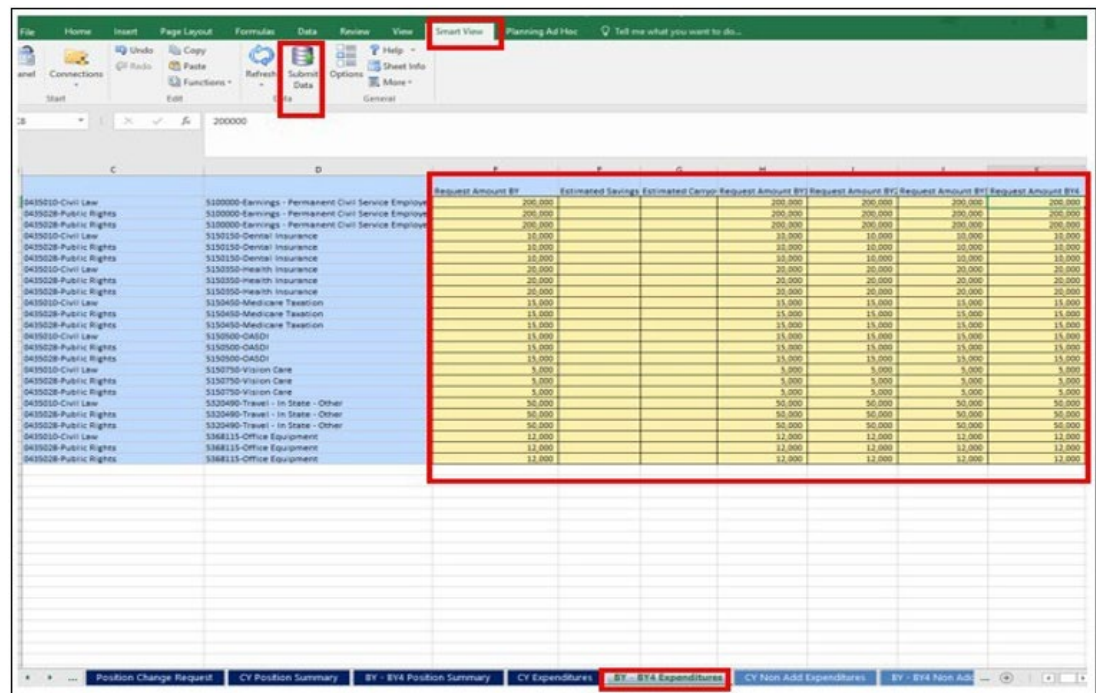
[illegible]

- 2 Paste the dollar values onto the **BY-BY4 Expenditures** tab of the **Smart View template** (the extra copy upload template file saved) in the **same cell location** as the source (in this case, from cells **E8 to K31**).

The screenshot shows a spreadsheet titled "Request Amount BY". The table has the following columns: Request Amount BY, Estimated Savings, Estimated Carryover Request Amount BY, Request Amount BY, Request Amount BY, Request Amount BY, and Request Amount BY. The rows list various items, including Civil Law, Public Rights, Earnings, Insurance, and Travel, with corresponding values. A red box highlights the "Request Amount BY" column.

3

Navigate to the **Smart View** ribbon tab and click the **Submit Data** icon to upload the data to Hyperion.



4

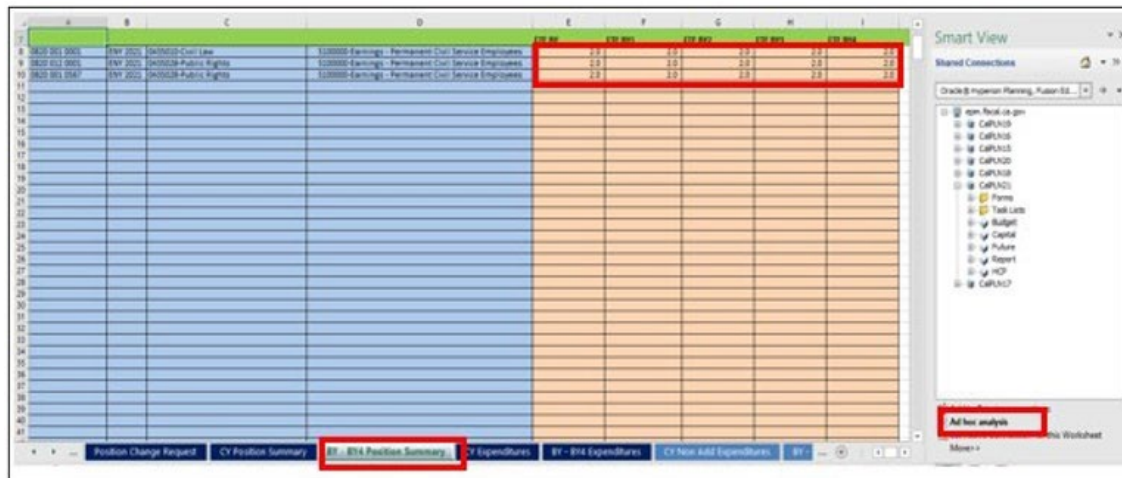
Data has now been successfully uploaded into the BR 0113 previously created in Hyperion and specified on the Budget Request Details tab of the upload template.

Note: The upload template values changed to a light-yellow background color after uploading signifying the upload into the Hyperion BR was successful.

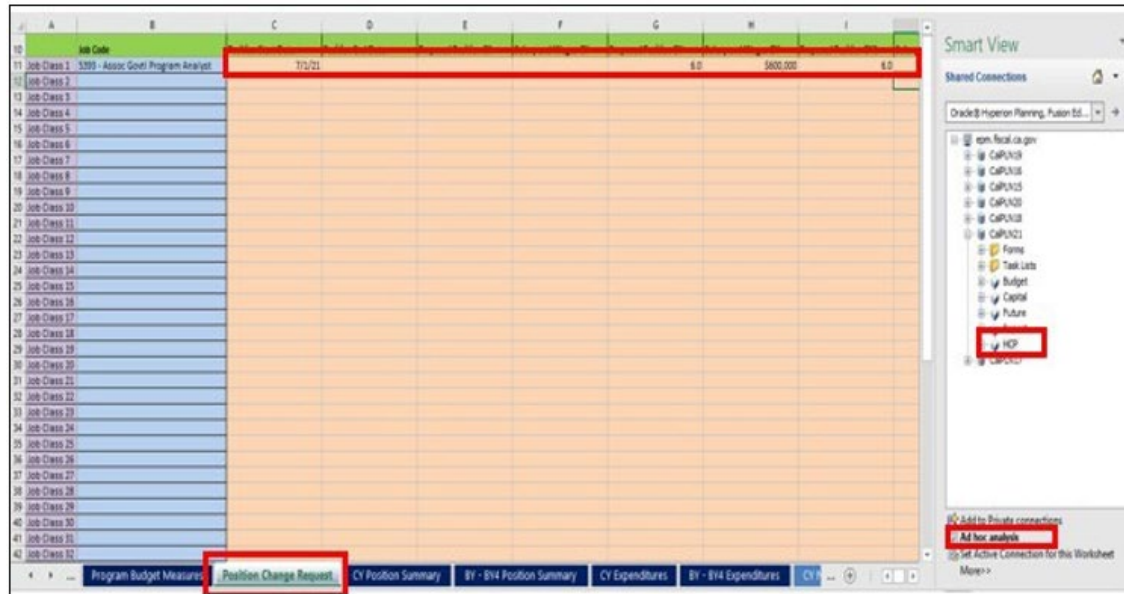
		Request Amount B1	Estimated Savings	Estimated Carryover	Request Amount B1	Request Amount B1	Request Amount B1	Request Amount B1	Request Amount B1
9435010-Civil Law	5100000-Earnings - Permanent Civil Service Employees	200000	Missing	Missing	200000	200000	200000	200000	200000
9435020-Public Rights	5100000-Earnings - Permanent Civil Service Employees	200000	Missing	Missing	200000	200000	200000	200000	200000
9435030-Public Rights	5100000-Earnings - Permanent Civil Service Employees	200000	Missing	Missing	200000	200000	200000	200000	200000
9435010-Civil Law	5100150-Dental Insurance	10000	Missing	Missing	10000	10000	10000	10000	10000
9435020-Public Rights	5100150-Dental Insurance	10000	Missing	Missing	10000	10000	10000	10000	10000
9435030-Public Rights	5100150-Dental Insurance	10000	Missing	Missing	10000	10000	10000	10000	10000
9435010-Civil Law	5100350-Health Insurance	20000	Missing	Missing	20000	20000	20000	20000	20000
9435020-Public Rights	5100350-Health Insurance	20000	Missing	Missing	20000	20000	20000	20000	20000
9435030-Public Rights	5100350-Health Insurance	20000	Missing	Missing	20000	20000	20000	20000	20000
9435010-Civil Law	5100450-Medicare Taxation	15000	Missing	Missing	15000	15000	15000	15000	15000
9435020-Public Rights	5100450-Medicare Taxation	15000	Missing	Missing	15000	15000	15000	15000	15000
9435030-Public Rights	5100450-Medicare Taxation	15000	Missing	Missing	15000	15000	15000	15000	15000
9435010-Civil Law	5100500-OASDI	15000	Missing	Missing	15000	15000	15000	15000	15000
9435020-Public Rights	5100500-OASDI	15000	Missing	Missing	15000	15000	15000	15000	15000
9435030-Public Rights	5100500-OASDI	15000	Missing	Missing	15000	15000	15000	15000	15000
9435010-Civil Law	5100750-Vision Care	5000	Missing	Missing	5000	5000	5000	5000	5000
9435020-Public Rights	5100750-Vision Care	5000	Missing	Missing	5000	5000	5000	5000	5000
9435030-Public Rights	5100750-Vision Care	5000	Missing	Missing	5000	5000	5000	5000	5000
9435010-Civil Law	5320490-Travel - In State - Other	50000	Missing	Missing	50000	50000	50000	50000	50000
9435020-Public Rights	5320490-Travel - In State - Other	50000	Missing	Missing	50000	50000	50000	50000	50000
9435030-Public Rights	5320490-Travel - In State - Other	50000	Missing	Missing	50000	50000	50000	50000	50000
9435010-Civil Law	5368115-Office Equipment	12000	Missing	Missing	12000	12000	12000	12000	12000
9435020-Public Rights	5368115-Office Equipment	12000	Missing	Missing	12000	12000	12000	12000	12000
9435030-Public Rights	5368115-Office Equipment	12000	Missing	Missing	12000	12000	12000	12000	12000

- 5 For position data, navigate to the **BY-BY4 Position Summary** tab on the **Smart View** version of the template, click the **Ad hoc analysis** option from the Smart View panel to reconnect to Smart View and **repeat steps 1 through 4** from this section to upload data into the BY-BY4 Position Summary tab in Hyperion.

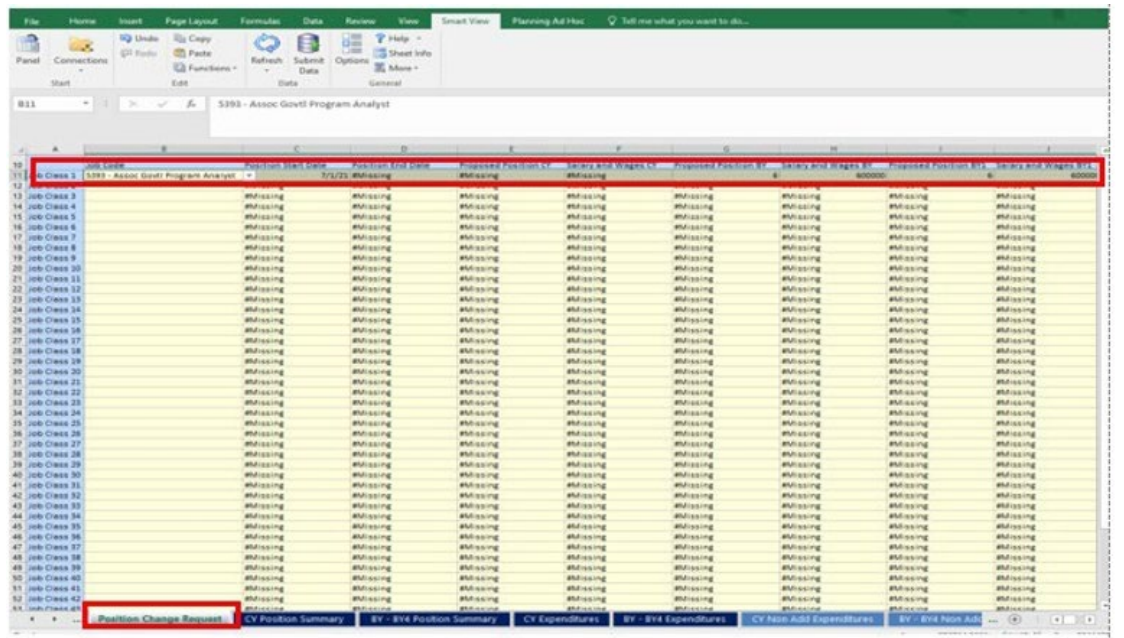
Users need to make sure that **all the position data** is copied and pasted to the same cell locations as in the master template. Otherwise, the source data will not be correctly uploaded to Hyperion.



- 6 For Position Change Request tab data, navigate to the **Position Change Request** tab in the **Smart View** version of the template. Navigate to the **Smart View** panel to change the shared connections from “Budget” to “HCP” by double left clicking on “HCP.” Click on “**Ad hoc analysis**” and close the pop-up refresh window.

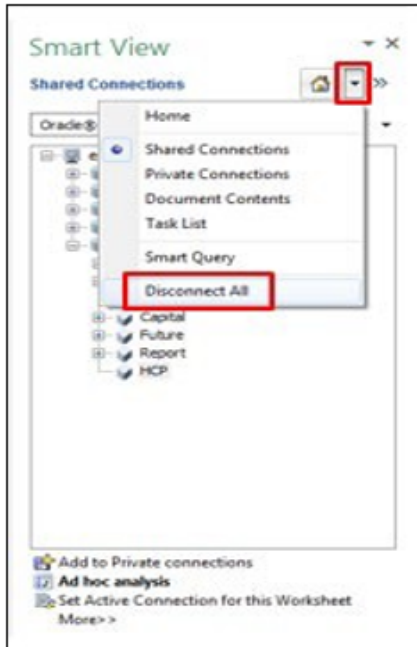


- 7 Repeat steps 1 through 4 from this section to upload Position Change Request data. Users need to make sure that all the position data is copied and pasted to the same cell locations as in the master template. Otherwise, the source data will not be correctly uploaded to Hyperion.



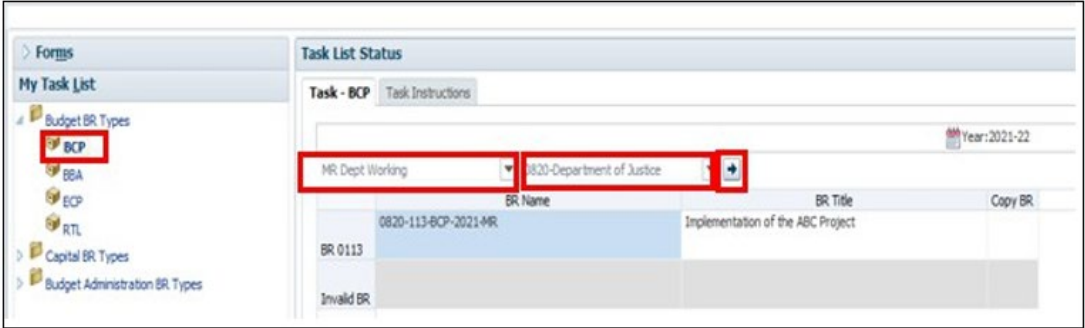
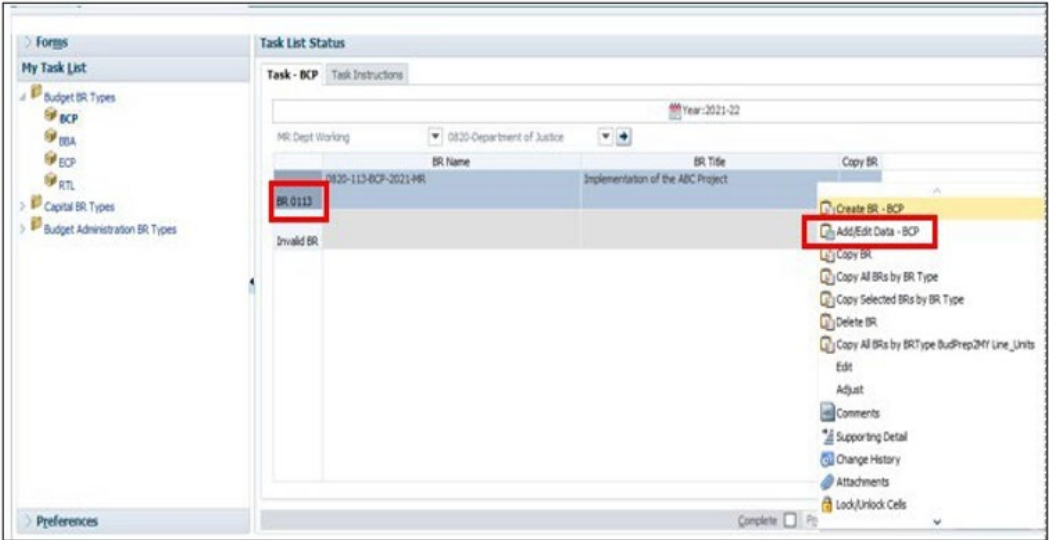
8

When you have completed uploading all data to Hyperion, navigate to the **Smart View** panel within the Smart View template file, click the **drop-down arrow next to the home icon** (picture of a house), and select the **Disconnect All** option to disconnect the connection between Smart View and Hyperion. (Optional: Click save under the File drop-down menu to save a copy of the template containing the uploaded data and close both the master/original and Smart View template files.)



Validate loaded data in Hyperion to ensure all the data was correctly uploaded

Log in to Hyperion and navigate back to the appropriate BR parameters.

Steps	Description
1	<p>In this example, navigate to the BCP Budget BR Type, MR Dept Working Version, 0820-Department of Justice Entity, and click the “Go” arrow button.</p> 
2	<p>Right-click the unique BR identifier number (in this case, BR 0113). Select the “Add/Edit Data - BCP” option from the drop-down menu.</p> 

- 3 Navigate to the **BR Summary - Expenditures** tab to verify the data uploaded through the template and validate the total expenditure and position amounts by Item and by year. To validate other information uploaded to the BR but not displayed on the BR Summary – Expenditures tab, run a Hyperion report.

The screenshot shows the 'Task List Status' window with the 'BR Summary - Expenditures' tab selected. The window displays a table with the following data:

Item	BNY	Program	Category	nt	Request Amount BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4	Position PY
0820 001 0001	BNY 2021	0435010-Civil Law	\$100000-Earnings - Permanent Civil Service Employees		200,000	200,000	200,000	200,000	200,000	
			\$150150-Dental Insurance		10,000	10,000	10,000	10,000	10,000	
			\$150250-Health Insurance		20,000	20,000	20,000	20,000	20,000	
			\$150450-Medicare Taxation		15,000	15,000	15,000	15,000	15,000	
			\$150500-CA3021		15,000	15,000	15,000	15,000	15,000	

- 4 Use the “**AFTER Upload Template Checklist—Departments**” to ensure the data was uploaded correctly. Refer to the latest version of the “Before and After Upload Template Checklists” on Finance’s [“FI\\$Cal Resources for Budget”](#) website.

END.

Appendix

Key Words

N/A

Definitions

N/A

Reference Materials

FI\$Cal ServiceNow website

FISCal.079 - Configuring Microsoft Excel Smart View Settings for Hyperion and Single Sign-on

Revision Table

Date	Version	Update Description
02/13/2025	10.0	Updated narrative to be consistent with the current process.
08/15/2024	9.0	Updated to include Multi-Factor Authentication one-time pin verification code required to log into FI\$Cal systems.
09/25/2023	8.0	Updated Department of Finance hyperlinks and narrative to be consistent with the current process.
04/13/2023	7.0	Updated Department of Finance hyperlinks. Added steps for FI\$Cal Privacy Policy and sign in Welcome page, how to obtain latest upload templates from Finance.
02/10/2023	6.0	Updated title to Uploading Budget Templates in Hyperion.
02/08/2022	5.0	Updated Departments to obtain upload templates directly from Department of Finance Business Operations notification or Finance Budget Analyst.
07/09/2021	4.0	Updated narrative and screen shots to be consistent with the current process. Updated to conform to FI\$Cal Learning Center deployment.
08/15/2019	3.0	Updated narrative and screen shots to be consistent with the current process.
08/08/2018	2.0	Updated narrative and screen shots to be consistent with the current process.

Contacts

For questions about this job aid, please contact the FI\$Cal Client Training Section at FiscalLearningCenter@fiscal.ca.gov.