

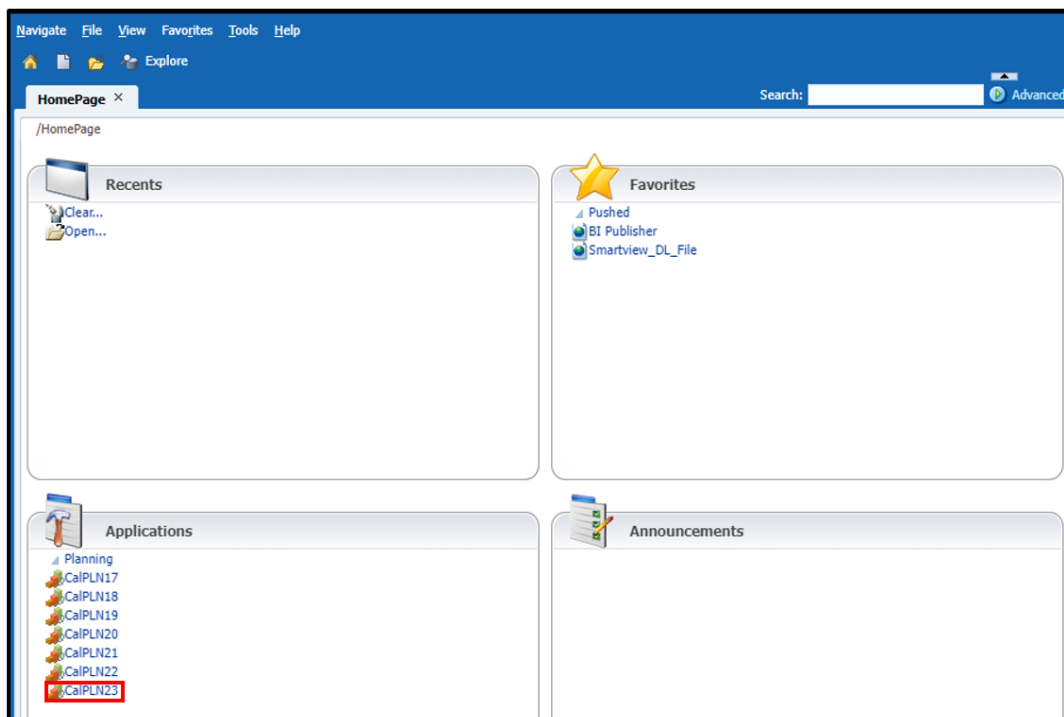
How to Copy Data to Out Years in Hyperion By Department of Finance

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

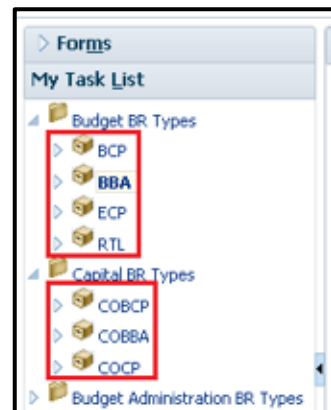
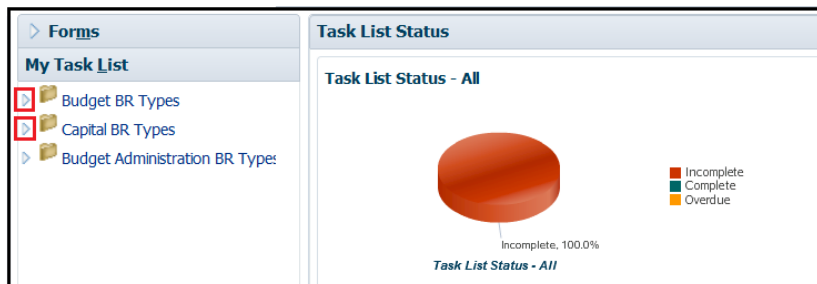
Purpose: Provides instructions on how to copy data from Budget Year (BY) to out years. Either from BY through BY+4 or from BY+1 through BY+4.


Step 1: On the Hyperion Homepage, under the Applications section, click on **CaIPLNXX**. A new tab will open the selected application in Hyperion.

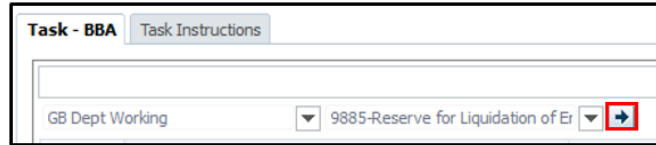
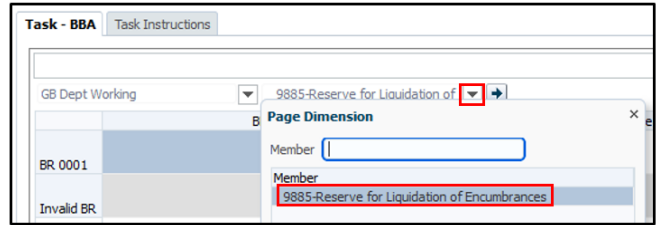
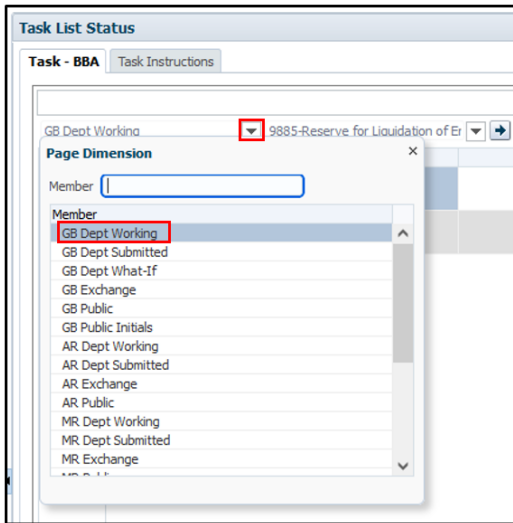
'XX' represents the first part of the fiscal year. In this example we are in the development of the 2023-24 budget cycle, therefore we will choose CaIPLN23.



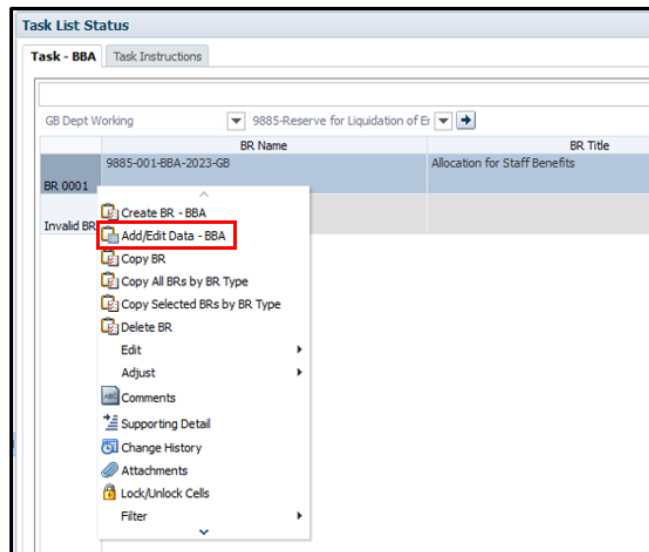
Step 2: Navigate to **My Task List** and select the **BR Type** from the left pane.



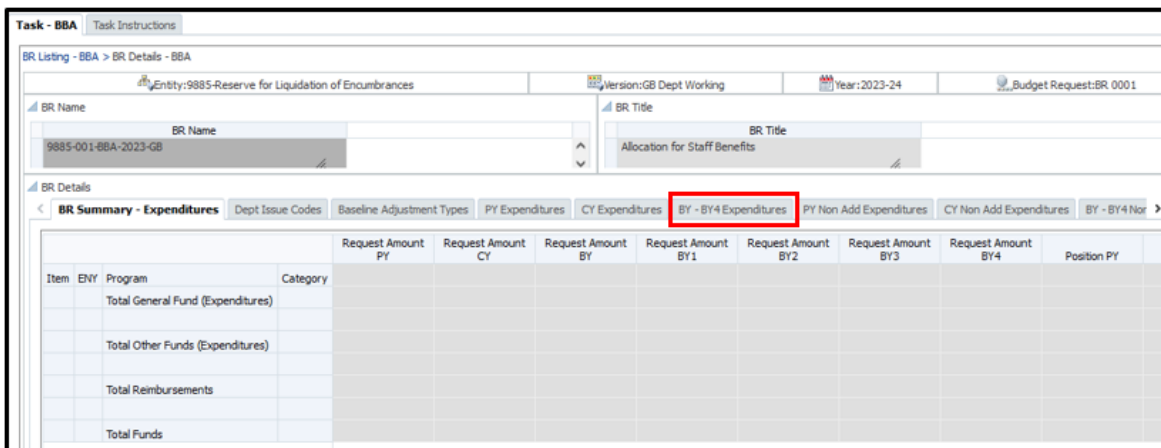
Step 3: Select the POV—Version and BU. Then click the “Go” arrow () to proceed.



Step 4: Select the desired BR, right click, and select **Add/Edit Data** from the selection list.



Step 5: Select the **BY - BY4 Expenditures** tab.



Step 6: Select the desired point-of-view (POV)—**3-part item** (BU-Reference-Fund), **ENY**, and **program** from the drop down menus. Then click the “GO” arrow. If the POV selected is **NOT** an active and valid combination, then the tab details will not display and a message will display instead. Double check the POV selected by verifying the item is active and the correct program was selected for the department and contact your Finance Budget Analyst.

Entity: 9885-Reserve for Liquidation of Encumbrances

BR Name: 9885-001-BBA-2023-GB

BR Title: Allocation for

BR Details

BR Summary - Expenditures | Dept Issue Codes | Baseline Adjustment Types | PY Expenditures | CY Expenditures | **BY - BY4 Expenditures** | PY Non Add Expe

9885 001 0001 ENY 2023 7825-Reserve for Liquidation of

Category	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY
510000-Earnings - Permanent Civil Service Employees				


BR Details

BR Summary - Expenditures | Dept Issue Codes | Baseline Adjustment Types | PY Expenditures | CY Expenditures | **BY - BY4 Expenditures**

9885 101 0890 ENY 2023 7825-Reserve for Liquidation of

Item is inactive or program is invalid for this BU. Contact Finance Analyst.

No data to display

Step 7: Enter data under the **Request Amount BY** column and save the data using the **Save** button  or selecting **Ctrl + S** on your keyboard.

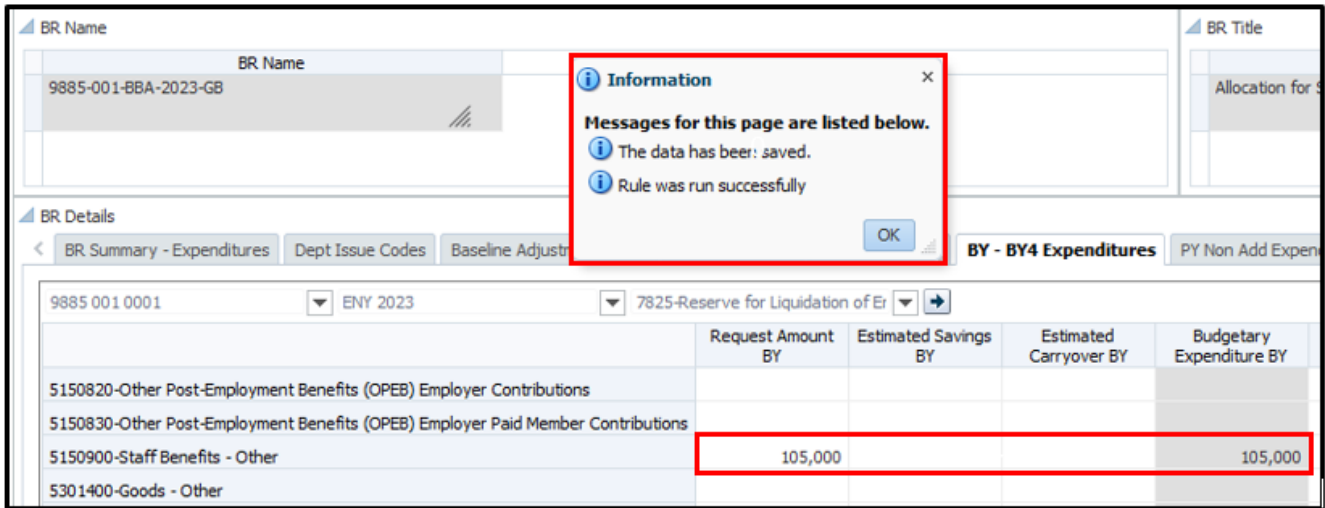
BR Details

BR Summary - Expenditures | Dept Issue Codes | Baseline Adjustment Types | PY Expenditures | CY Expenditures | **BY - BY4 Expenditures** | PY Non Add Expe

9885 001 0001 ENY 2023 7825-Reserve for Liquidation of

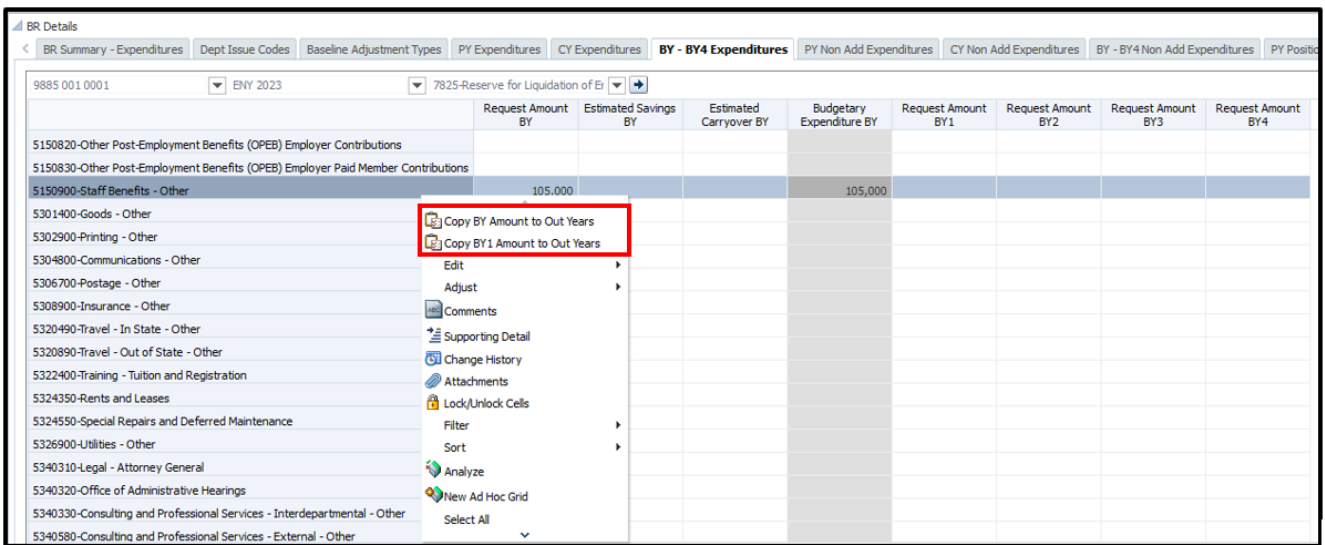
Category	Request Amount BY	Estimated Savings BY	Estimated Carryover BY	Budgetary Expenditure BY
5150820-Other Post-Employment Benefits (OPEB) Employer Contributions				
5150830-Other Post-Employment Benefits (OPEB) Employer Paid Member Contributions				
5150900-Staff Benefits - Other	105,000			
5301400-Goods - Other				

If successfully saved, the fields will change from a yellow background color (meaning that the changes made have not been saved yet) to a white background color and a successful pop-up message will appear. Click **OK**.

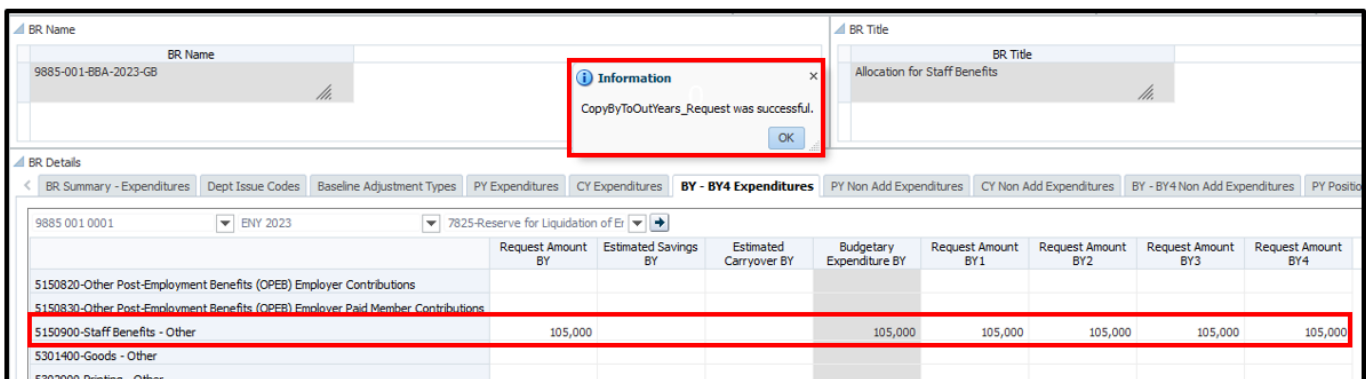


Step 8: Right click anywhere on the form and select “Copy BY Amount to Out Years (or Copy BY1 Amount to Out Years).”

Note: *The business rule will be executed and will copy all data entered at ALL POVs for the entire BR within the same form/tab (see step 10 for the different forms/tabs).*



After successfully copying, the following message will be displayed. Click OK.



Step 9: Validate the copy by either viewing the change on the specific data entry form or navigating to the **BR Summary – Expenditures** tab or run a **Detailed Multi-Year Expenditures report** (after a FR report refresh).

BR Details				Request Amount PY	Request Amount CY	Request Amount BY	Request Amount BY1	Request Amount BY2	Request Amount BY3	Request Amount BY4
Item	ENY	Program	Category							
9885 001 0001	ENY 2023	7825-Reserve for Liquidation of Encumbrances	S150900-Staff Benefits - Other			105,000	105,000	105,000	105,000	105,000
		Total General Fund (Expenditures)				105,000	105,000	105,000	105,000	105,000
		Total Other Funds (Expenditures)								
		Total Reimbursements								
		Total Funds				105,000	105,000	105,000	105,000	105,000

Congratulations. You have successfully copied data to out years.

The same process outlined above can be followed to copy BY data to out years or copy BY1 data to out years on the following Hyperion data entry forms:


Budget (BCP, BBA, ECP & RTL)

- BY - BY4 Expenditures
- BY - BY4 Non Add Expenditures
- BY - BY4 Position Summary
- Position Change Request
- BY - BY4 Revenues

Capital (COBCP & COBBA)

- BY - BY4 Expenditures - Capital
- BY - BY4 Non Add Expenditures – Capital

Note about the revenue forms:

Please note that the revenue forms contain parent level revenue category codes (these are the grayed-out 3-digit revenue category codes displayed on the form [i.e., 417–Other Revenue]). To view the aggregated data (at the parent level) after running the business rule in the **Revenue BY - BY4** tab, users will need to select the **Save** button . This action is not required to view data in the **BR Summary – Revenue** tab. Please see the revenue examples on the following pages.

In a RTL BR on the BY – BY4 Revenue form and selecting to run the “Copy BY Amount to Out Years” business rule:

The screenshot shows the 'BY - BY4 Revenues' form with a context menu open over the row '4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-'. The menu options include 'Copy BY Amount to Out Years', 'Copy BY1 Amount to Out Years', 'Edit', 'Adjust', 'Comments', 'Supporting Detail', 'Change History', 'Attachments', 'Lock/Unlock Cells', 'Analyze', 'New Ad Hoc Grid', 'Select All', 'Data Validation Messages', and 'Apply'. The 'Copy BY Amount to Out Years' option is highlighted in yellow.

	Revenues BY	Revenues BY1	Revenues BY2	Revenues BY3	Revenues BY4
4172800-Parking Violations					
4172900-Penalty Assessments - Criminal Fines					
4172950-Penalty Assessment - GC 76 1047 DNA ID					
4173000-Penalty Assessments - Other					
4173100-Personal Income Tax - Penalties and Interest					
4173200-Proceeds from Estates of Deceased Persons					
4173300-Sales - Other					
4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-	14,000,000				
4173500-Settlements and Judgments - Other					
4173600-State Public Land Sales					
4173700-Subsequent Injuries Revenue					
4173800-Traffic Violations					
4173900-Tribal Gaming Revenues					
4174000-Unclaimed Contributions					
4174100-Unemployment and Disability Insurance Contributions - Penalties and Inte					
4174200-Uninsured Motorist Fees					
417-Other Revenue	14,000,000				

BY – BY4 Revenue form after running the “Copy BY Amount to Out Years” business rule:

The screenshot shows the 'BY - BY4 Revenues' form after running the business rule. The row '4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-' now has values of 14,000,000 in all five revenue columns (BY, BY1, BY2, BY3, BY4). The total '417-Other Revenue' remains at 14,000,000.

	Revenues BY	Revenues BY1	Revenues BY2	Revenues BY3	Revenues BY4
4173000-Penalty Assessments - Other					
4173100-Personal Income Tax - Penalties and Interest					
4173200-Proceeds from Estates of Deceased Persons					
4173300-Sales - Other					
4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000
4173500-Settlements and Judgments - Other					
4173600-State Public Land Sales					
4173700-Subsequent Injuries Revenue					
4173800-Traffic Violations					
4173900-Tribal Gaming Revenues					
4174000-Unclaimed Contributions					
4174100-Unemployment and Disability Insurance Contributions - Pen					
4174200-Uninsured Motorist Fees					
417-Other Revenue	14,000,000				

BY – BY4 Revenue form after running the business rule and selecting save:

	Revenues BY	Revenues BY1	Revenues BY2	Revenues BY3	Revenues BY4
4173000-Penalty Assessments - Other					
4173100-Personal Income Tax - Penalties and Interest					
4173200-Proceeds from Estates of Deceased Persons					
4173300-Sales - Other					
4173400-Settlements and Judgments - Anti-Trust Actions -Attorney General-	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000
4173500-Settlements and Judgments - Other					
4173600-State Public Land Sales					
4173700-Subsequent Injuries Revenue					
4173800-Traffic Violations					
4173900-Tribal Gaming Revenues					
4174000-Unclaimed Contributions					
4174100-Unemployment and Disability Insurance Contributions - Penalties and Inte					
4174200-Uninsured Motorist Fees					
417-Other Revenue	14,000,000	14,000,000	14,000,000	14,000,000	14,000,000

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)
- E-mail: fiscalservicecenter@fiscal.ca.gov
 - cc: your Finance Budget Analyst

Business/Process Questions:

Contact your Finance Budget Analyst