

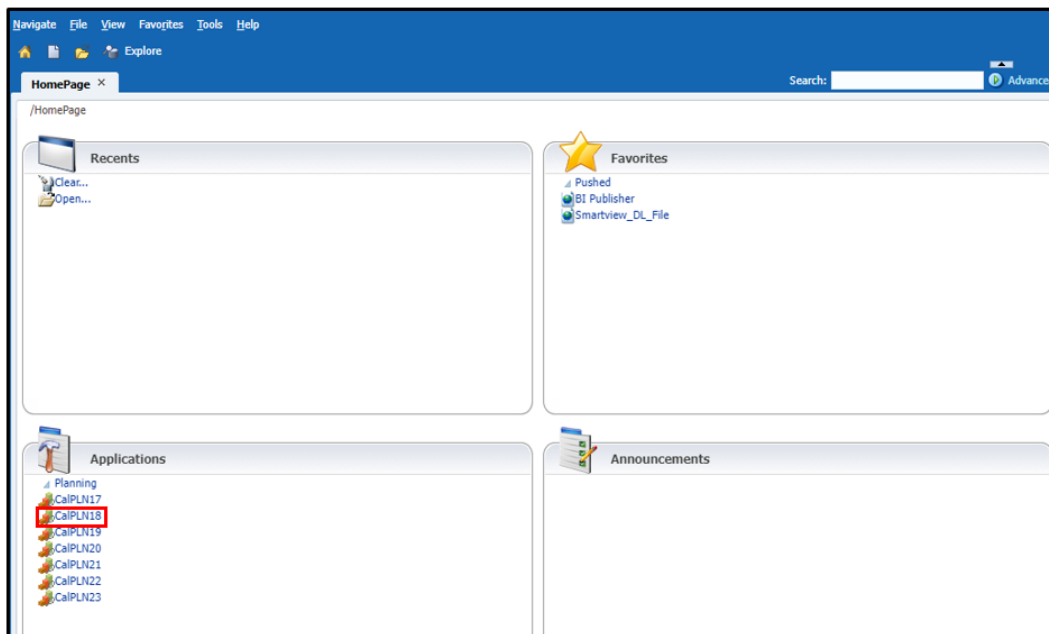
How to Clear Data in a Budget Request and How to Delete a Budget Request in Hyperion By Department of Finance

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

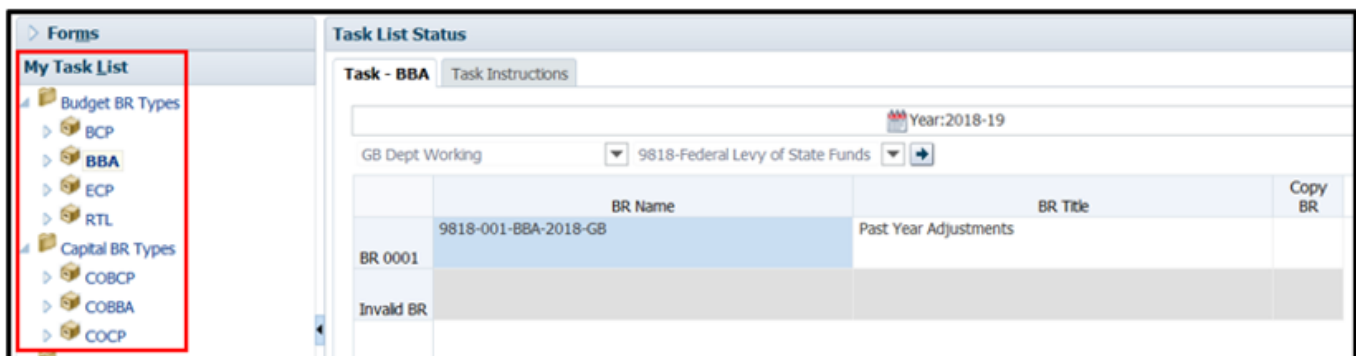
Purpose: Provide instructions to: (1) delete data (dollars and position information) in a Budget Request (BR) and (2) delete a BR container.

Step 1: On the Hyperion Homepage, under the Applications section, click on the **CalPLNXX** button. A new tab will open.

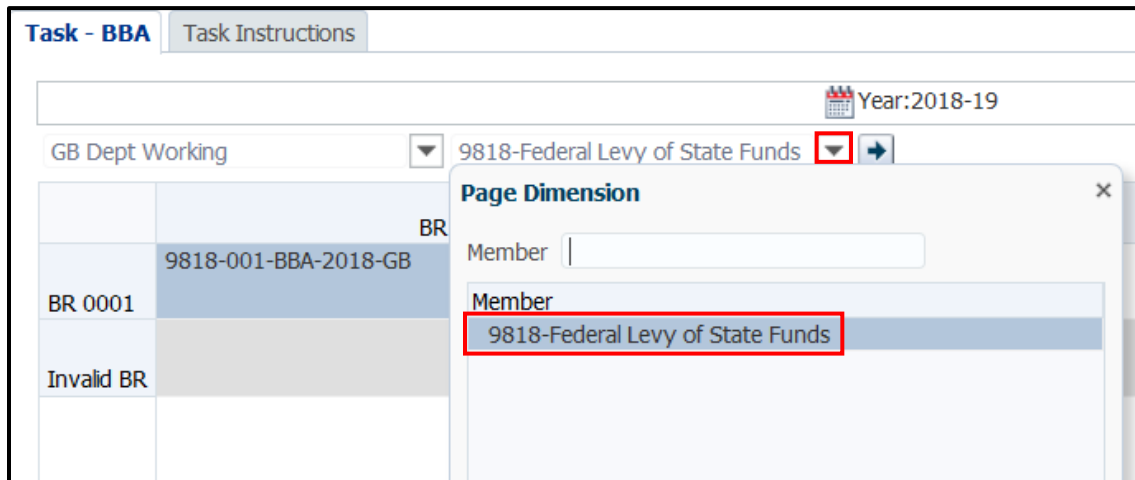
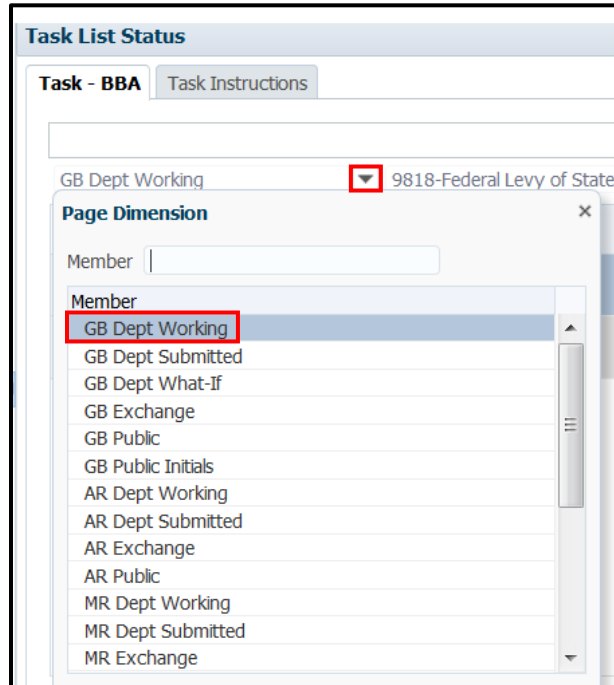
'XX' represents the first part of the fiscal year. In this example we are in the development of the 2018-19 budget cycle, therefore we will choose CalPLN18.



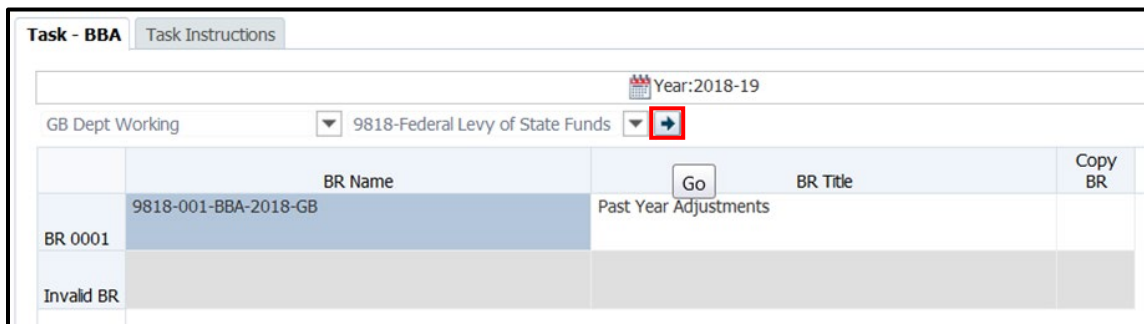
Step 2: Navigate to **My Task List** → Select the **Budget BR Type** or **Capital BR Type**. In the drop-down list, select the desired BR type. In the following example, **BBA** was selected.



Step 3: Select the point of view (POV)—**Version** and **BU** from the drop down lists.

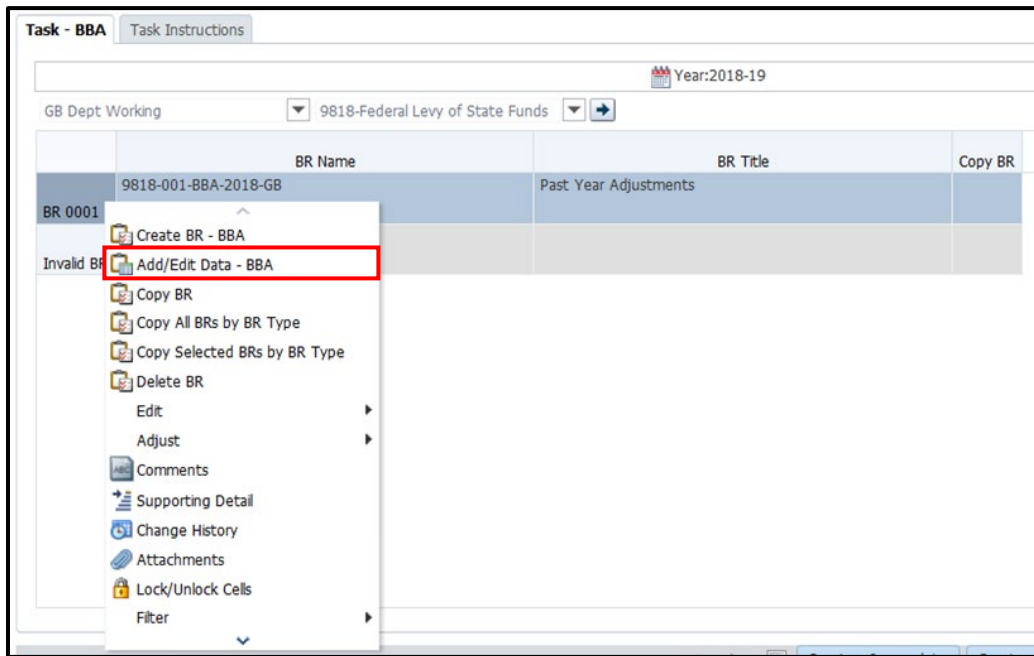


Step 4: Click the “GO” arrow to proceed

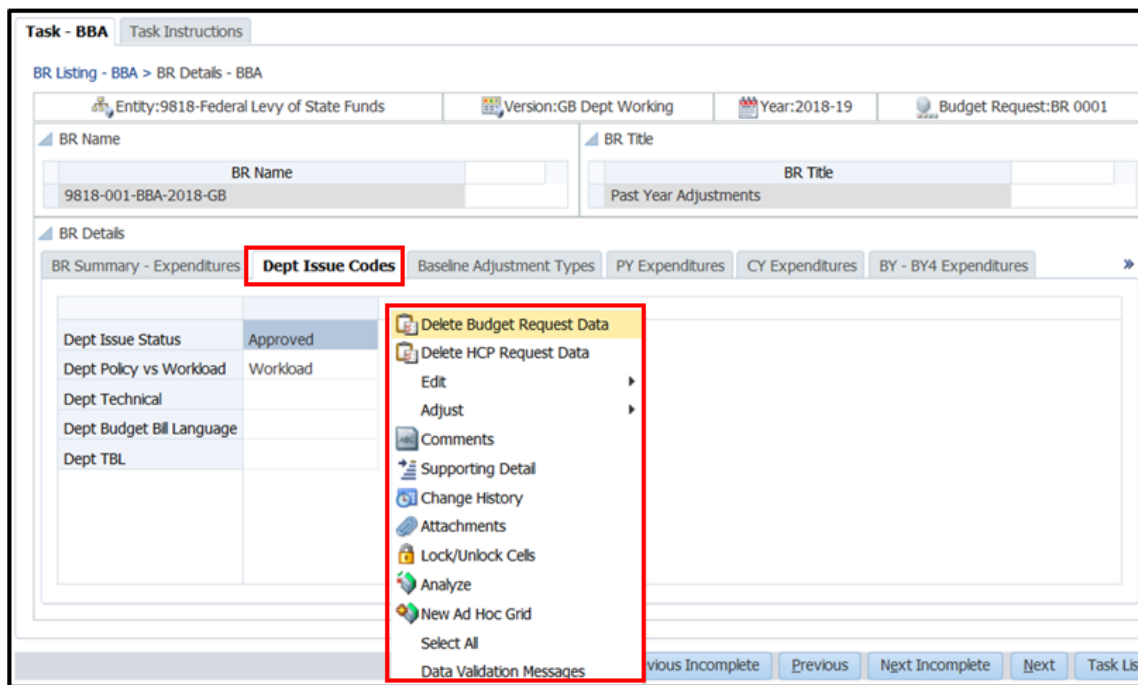


To clear data from a BR, follow Steps 5 through 8 below. To delete a BR, skip to Step 9.

Step 5: Select the BR to be deleted by right clicking on the associated BR number and selecting **Add/Edit Data**.



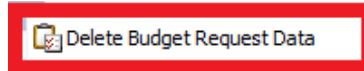
Step 6: Select the **Department Issue Codes** tab. Right click anywhere on the form and a pop-up menu will open.



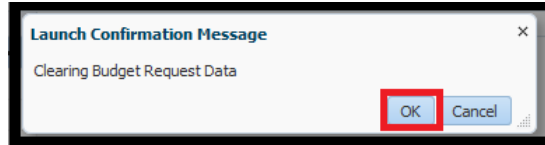
Step 7: To clear all dollars and position (also known as Full-Time Equivalent [FTEs]) data on the Position Summary tab:

Note: Position/FTE data on the Position Change Request tab must be cleared separately and is outlined in Step 8 below.

- Select the first option, “Delete Budget Request Data”.



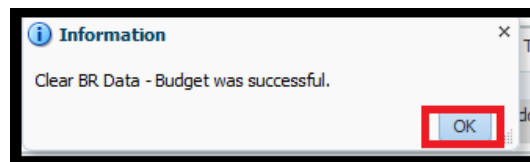
- Click **OK** on the prompt that appears to continue with the data deletion.



- As the data is being deleted, the following message displays:

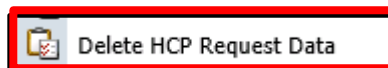


- The following message will display when all the data has been successfully deleted. Click **OK**.

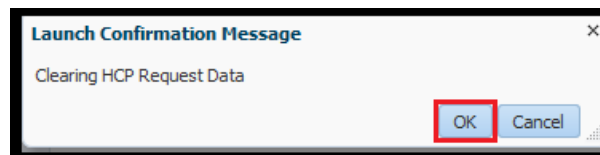


Step 8: If applicable, to clear position/FTE details on the Position Change Request tab:

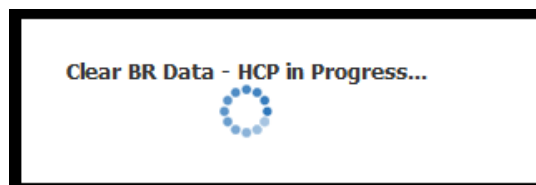
- On the **Department Issue Codes** tab, right click anywhere on the form and select the second option “Delete HCP Request Data”.



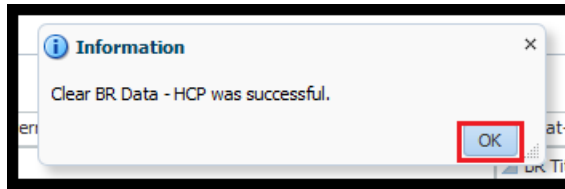
- Click **OK** on the prompt that appears to continue with the data deletion:



- As the data is being deleted, the following message displays:

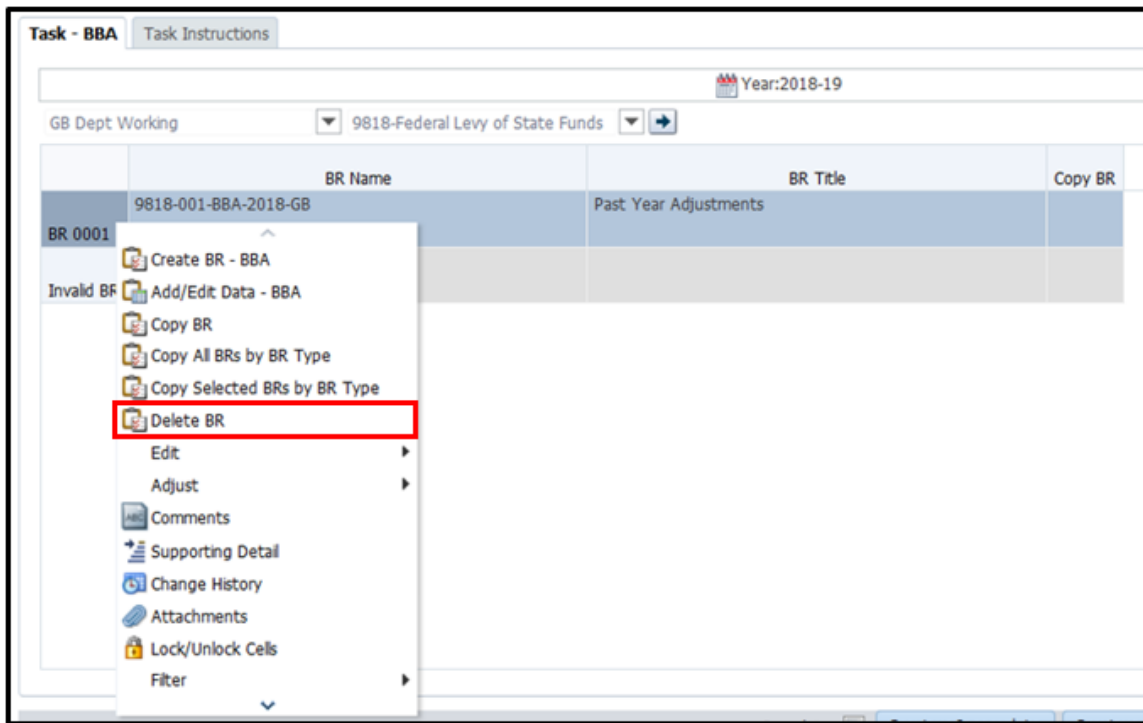


- The following message is displayed when all the data has been successfully deleted. Click **OK**.

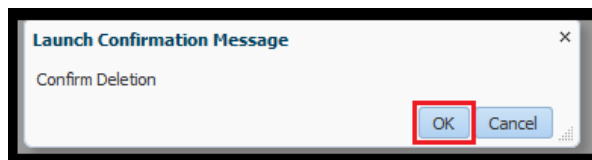


By viewing the **BR Summary-Expenditures** and **Position Change Request** tabs, a user can confirm that the data has been cleared/deleted from the BR if there is no data displayed on the forms.

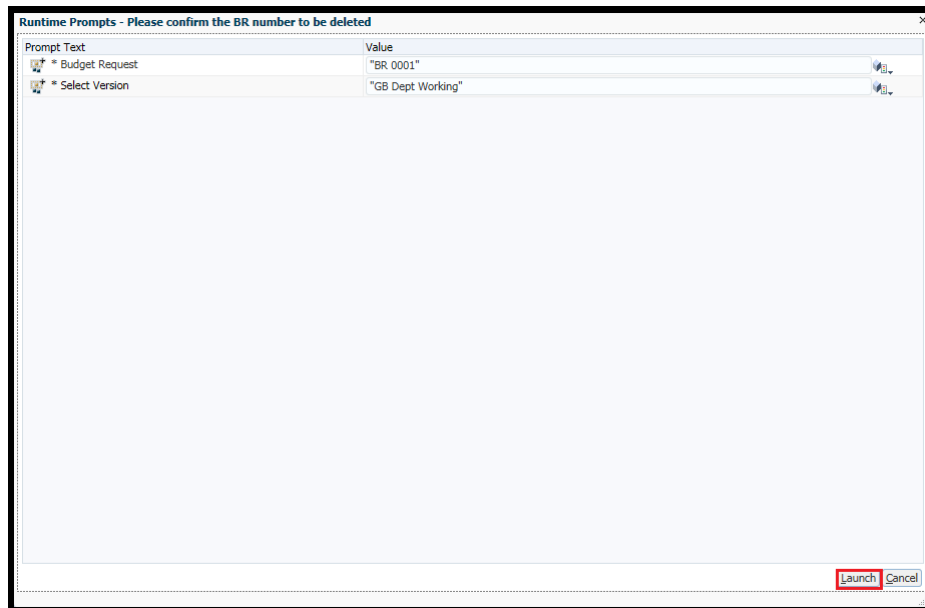
Step 9: To delete a BR, navigate to the BR Listing page, right click on the associated BR to be deleted and select **Delete BR**.



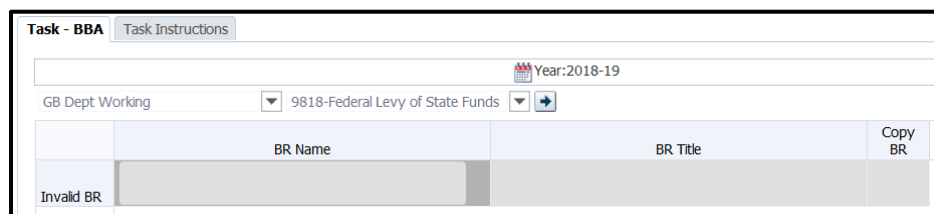
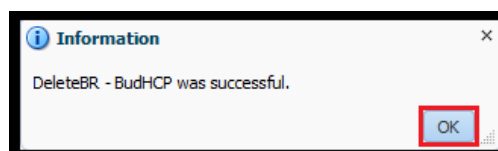
Step 10: Click **OK** on the prompt that appears to continue with the BR deletion.



Step 11: Verify the associated BR number and the Version are correct before clicking **Launch**.



Step 12: The following message displays when all the data has been successfully deleted. Click **OK**. The BR container has been deleted.



Congratulations. You have successfully cleared data from a BR and deleted 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)
- E-mail: fiscalservicecenter@fiscal.ca.gov

Business/Process Questions:

Contact your Finance Budget Analyst