

AGENCY BPM – OPERATING BUDGET QUICK STEPS

Copy to a New Version - Select a budget version to copy

Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

1. Enter or select **Preparer** in the **Role Name** field.
2. Click **Search**.
3. A list of all models available to someone with the specified role displays.
4. Click the **Scenario** for which you wish to copy a version.

The **My Planning Workspace** page displays the planning center budgets for that model.

5. Click the **Copy** link for the line item of the version to copy.

The **Copy Version** page displays.

6. Select which version (**Master**, **Version 1**, or **Version 2**) in the **To Version** drop-down list.
7. Enter a **Description** that will allow you and your coworkers to identify the version.
8. Click **OK**.
9. **My Planning Workspace** displays again, with the new copy displayed in the list of models.