AGENCY BPM – CAPITAL BUDGET QUICK STEPS

Attaching, Viewing and Deleting Supporting Documents

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 appropriate **Scenario**.
   The **My Planning Workspace** page displays the planning center budgets for that model.
5. Select the appropriate budget option in the **Activity** drop-down list.
6. Select the appropriate option in the **Scenario** drop-down list.
7. Click **Refresh**.The table updates to display the versions for the selected **Activity**.
8. Click the **Edit** link for the version to which a document attachment should be made.
9. Click on the paper icon in the **Notes** column.
   The **Line Item Notes** screen displays. Scroll down to the bottom of the screen.

In the **Attach Documents**, **File Details** box:

10. Enter a descriptive name for the document in the **Description** field.
11. Click **Attach**
    The **Attach Budget Documents** page displays. If files have already been attached, a line item will display for each attached file.
    An **Upload** window displays.
12. Click **Browse**.
13. The **Choose File** window displays.
14. Navigate to and select the desired file, then click **Open**.
    The full path for the selected file displays in the text field.
15. Click **Upload**.

    The **Attach Documents**, **File Details** box redisplays. There is now a link with the file name to the left of the **Description** field, and the **Added By** and **Date Added** fields are populated.

    Delete attachments by clicking the **Delete** button on the **Attach Budget Documents** page.
16. Click **OK**.
    The **Line Item Details** page displays.
    There is now a pushpin in the **Note** icon to indicate an attachment (or note) for that line item.
17. Click the **Unlock** link when done.
    The **My Planning Workspace** page displays.