AGENCY BPM – CAPITAL BUDGET QUICK STEPS

Locking and Unlocking a Working Version of Budget

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** you wish to unlock.

   The **My Planning Workspace** page displays the planning center budgets for that model.
5. Click **Unlock** or **Release**, as necessary, for the desired version.