

AGENCY BPM – CAPITAL BUDGET

QUICK STEPS

Submit Approved Planning Center 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 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 you want to submit
The **Line Item Details** page displays.
9. Verify each line item for accuracy.
10. Click the **Select** check box next to a line item (ChartField string) that is ready for submission.
Multiple planning centers can be selected.
11. Click **Submit**
The **Submit Confirmation** page displays.
12. Review the Planning Centers information to confirm the correct items are being submitted.
13. Click **OK**.
The selected line items are copied to the **Master Version** and submitted to the **OBM Budget Analyst**. The **My Planning Workspace** page again displays. The **Status** of the submitted items is **Submitted**, in both the version being viewed and the **Master Version**.
14. Noticed that there are now two versions showing as **Submitted** – the **Working Version** and a new **Master Version**.