AGENCY BPM – OPERATING 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 **Scenario** that has a version to which line items (ChartField Strings) need to be added.
5. Select the appropriate budget option in the **Activity** drop-down list.
   The **My Planning Workspace** page displays the planning center budgets for that model.
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 **Edit**.
9. Click the **Notes** icon for the version to which a document should be attached.
   The **Notes** page displays.
10. Scroll to the bottom of the **Notes** page.
    The **Attach Documents** section is located at the bottom of this page. If files have already been attached, a line item will display for each attached file.
11. Enter a descriptive name for the document to be attached in the **Description** field.
12. Click **Attach**.
    An upload page displays.
13. Click **Browse**.
    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 Uplo**a**d.

    The **Attach Documents** page redisplays. There is now a link with the file name to the left of the **Description** field, and the User ID and Date/Time Stamp fields are populated.
16. Click **OK**.
    The **Line Item Details** page displays.
17. Attachments can be deleted by clicking the **Delete** button on the **Attach Budget Documents** page.
18. Click the **OK** button when you have added, deleted or viewed an attachment on the **Attach Budget Documents** page.