AGENCY BPM – BEST PRACTICES QUICK STEPS

Best Practices for BPM Activities	
Naming Working Versions	When copying a version, give the new version a name that is meaningful.
How to Report on Working Versions	Copy into a master version and run the report prior to submitting the master version.
Saving Favorite Links in BPM (i.e., My Planning Workspace)	Create a "Saved Search" to generate the search criteria you use most frequently. For example, save one search as a "**Preparer**" and save another as a "**Reviewer.**" **Save Search Criteria** appears at the bottom of the **My Planning Workspace** screen.

Save Viewing Preferences in BPM (i.e., which fields and sorting order are displayed, adding in descriptions – setting up different views)	Users can set up viewing preferences and save the view(s) for future use. This is done through the **User View Details** page.
	
	 • Click the **Create** link in the **User View** group box on the **Line Item Details** page).
	 • Enter a description for the view definition.
	 • Click **Copy** to copy the user view.
	
	 Entering Row Display Filter Information:
	 • Access the **Row Display Filter** page (select the **Row Display Filter** tab on the **User View Details** page).
	
	 🌰 **Casual Preparers** cannot define any private views. They can only select public views defined by the coordinator.
	 • **Dimensions** – displays only those **Dimensions** available to you, defined by **Activity**.
	 • **Dimension Level** – select up to three dimensions to display on the row, nested hierarchically in the order you select them. Values are "First," "Second," and "Third."
	 This field is grayed out if all of the following conditions are true:
	    • The user navigated to this page from the **Line Item Details** page.
	    • The user has only partial access to the planning center version from which they are navigating.
	    • User view is private.
	
	 🌰 For a flat view, do *not* select any dimension levels.
	 • **Show Code** – select to display the associated dimension's value code.
	 • **Show Description** – select to display the associated dimension's description.
	 • **Filter Dimension Members** tab - specify the From and To range and

the Account Category that you want to display for each of the dimension rows.

Enter Display Option Information

- Access the **Row Display Options** page (select **Row Display Options** tab on the **User View Details** page).

- **Row Summary** – select to display only summary nodes for the first row dimension.

- **Row Detail** – select to display only detailed (editable) cells for all row dimensions.

- **Hide Zero Total Amounts for Proposed Budget/Forecast** – select to hide line items for which the total amount is zero (0). If you select this option, the system displays only those line items with entered values.

- **Method Amount** – select to display the assigned method rows for accessing method details or entering budget amounts.

- **Adjustment Amount** – select to display rows for incremental or mass adjustment amounts when applied.

- **Allocation Amount** – select to display amount rows that you cannot modify using the line item activity; these amounts are applied through the **Edit Allocation** option when available on **My Planning Workspace** for the master version.

- **Total Amount** – displays the total of the method, adjustment, and allocation amount.

  🌰 Access to modifying the method, adjustment, and allocation amount must be granted.

- **Display Entry Currency** – select to display all entry currency rows. Alternatively, enter a currency value in the **Filter Dimension Members** grid on the **Row Display Filter** page to display only one entry currency.

- **Preparation** – Historical information appears as full year totals in the columns.

Large Variances from Current Biennium Appropriation and What is Being Requested for the next Biennium	In these situations, as much documentation as possible should be attached to the line item. As a **Preparer**, it is necessary to be able to explain large variances as well as any new request being made for the next Biennium.
Unlocking Planning Centers When Exiting	Only one planning center can be open at one time and only one **Preparer** can be working in that planning center at one time. It is imperative that you unlock planning centers when you are exiting so that other **Preparers** and **Reviewers** can open the planning center and so that you can open other planning centers.
Use Dimension 1 Field for Initiatives	Optional. It is helpful to be able to write narrative for request when you can group ChartField strings together and show as one Initiative. More instructions will be included in the OBM Operating Budget Guidance.
How to Use SOPPS Projections for Budget Preparation	Refer to the OBM Operating Budget Guidance for instructions on using SOPPS Projects in your Budget Preparation.
Be Able to Write Narratives to go	There may be questions from **Reviewers** and **OBM Budget Analysts**

along with Budget requests	regarding ChartField strings within your budget. Be prepared to explain why you made the request. Writing a narrative related to the request and attaching it to the line item will provide much needed documentation.