Copy to a New Version - Select a budget version to copy

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 for which you wish to copy a version.
   The My Planning Workspace page displays the planning center budgets for that model.
5. Click the Copy link for the line item of the version to copy.
   The Copy Version page displays.
6. Select which version (Master, Version 1, or Version 2) in the To Version drop-down list.
7. Enter a Description that will allow you and your coworkers to identify the version.
8. Click OK.
9. My Planning Workspace displays again, with the new copy displayed in the list of models.