AGENCY BPM – OPERATING BUDGET QUICK STEPS

Entering, Deleting, Viewing Line Item Notes

Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

1. Enter or select **Preparer** in the **Role Name** field.

2. Click **Search** - A list of all models available to someone with the specified role displays.

3. Click the appropriate **Scenario** - The **My Planning Work** space page displays the planning center budgets for that model.

4. Select the appropriate budget option in the **Activity** drop-down list.

5. Click **Refresh** - The table updates to display the versions for the selected **Activity**.

6. Click the **Edit** link for the version to which a line item (ChartField string) note(s) should be added - The **Line Item Details** page displays.

8. Click the **Notes** icon for the appropriate line item (ChartField string) - The **Line Item Notes** page displays.

9. Enter notes in the **Enter Notes** text box.

10. Select the radio button for the appropriate privacy setting for the note: **Public** or **Private**.

11. Click **Append Note to Log** - The text you entered is moved to the **Notes Log** text box.

12. Click **OK** - The **Line Item Details** page displays. **BPM** highlights the row just changed. The **Notes** icon for that line item now has a pushpin in it.

14. **Deleting a Note**: Begins with clicking the **pushpin note.**

15. Click the **trash can icon** to delete the note displayed.

16. **Viewing a Note** is a simple matter of clicking the pushpin icon.

17. Click the **Unlock** link when you are done. The **My Planning Workspace** page displays.