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.

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

8. Enter notes in the Enter Notes text box.

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

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

11. 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.

12. Deleting a Note: Begins with clicking the pushpin note.

13. Click the trash can icon to delete the note displayed.

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

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