Entering a Budget Line Item

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.
   The Line Item Details page displays, with the notice “This version is locked to others while you are editing.”
5. Select the appropriate Activity.
   The exact option name varies by agency.
6. Select the appropriate Scenario.
7. Click Refresh.
   The table updates to display the versions for the selected Activity.
   The My Planning Workspace page displays the planning center budgets for that model.
8. Click the Edit link for the version to which items need to be added.
   The Line Item Details page displays.
9. Verify that Add Entry is selected in the Action drop-down field, then click Go.
10. Enter an Account code for the line item (ChartField string) to be created.
11. Enter a Fund Code.
12. Enter a Program Code.
13. Select an ALI.
15. Click the Add a New Row icon to add more items and fill them in as above.
16. Click Add. The line item (ChartField string) is added to the Line Item Details page.
17. Scroll to the right of the row to make any revisions to the numbers or delete a number. This is the preferred method.
18. Click OK. The amounts are added to the working version of this budget. Click the Save button.
   The line just updated is highlighted.