AGENCY BPM – OPERATING BUDGET QUICK STEPS

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**.
14. Select an **Initiative**.
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.