AGENCY BPM – OPERATING BUDGET
QUICK STEPS

Locking and Unlocking a Working Version of Budget

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 you wish to unlock.

   The My Planning Workspace page displays the planning center budgets for that model.

5. Click Unlock or Release, as necessary, for the desired version.