AGENCY BPM – OPERATING BUDGET
QUICK STEPS

Rejecting a Planning Center Budget (Reviewer)

Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

1. Enter or select Reviewer in the Role Name field.
2. Click Search.
3. A list of all models matching the search criteria displays.
4. Click the appropriate Scenario.
   The My Planning Workspace page displays the planning center budgets for that model.
   If the Status displays "Not Ready," this budget can be viewed, but no changes can be
   made until the Status displays "Submitted."
5. Select the appropriate budget option in the Activity drop-down list.
6. Select the appropriate option in the Scenario drop-down list.
7. Click Refresh.
   The table updates to display the versions for the selected Activity.
8. Click the View link of the master version line item for the planning center budget to review.
9. IMPORTANT: Check the agency's planning targets.
   BPM-0006: Agency to Target Compare Report
10. Click the My Workspace link to review the budget breakdown.
    The My Planning Workspace page displays an overview of the Status.
11. Click the My Review Workspace link to review the details of the budget.
    The My Planning Workspace page displays, the My Review Workspace text is no longer
    a link, and the My Preparation Workspace text, to the left, is now a link.
12. Select the budget version to review in the Version drop-down list for the desired planning
    center.
13. Click the View link for that line item.
   The Line Item Details page displays.
   Adjust the page dimensions (i.e., what columns are displayed in the table.)
   a. Click the Dimensions and Members header bar arrow.
      The section expands.
   b. Select (or deselect) the desired dimensions.
   Any options selected will display on the page.
c. Click **Refresh Dimensions**.
The table display refreshes to match the dimensions selected.

14. Click the **My Workspace** link.
The **My Planning Workspace** page displays.

15. If the budget line item needs more work, click **Reject**. This is done from the **My Review Workspace** page.

16. Click the **OK** button to confirm the rejection.