AGENCY BPM –
QUICK STEPS

Versions

- A **Working Version** (e.g., **Versions 1, 2, and 3)** is a working draft of a scenario/activity.
- There are scenarios/activities that the agency must submit for each planning center for the operating budgeting. For each planning center scenario/activity, the agency can create up to 35 different working versions. A best practice is to use up to three working versions.
- OBM provides a **Base Version (version 0)** to start the agency's planning and budgeting.
- **Version 1** is a copy of the **Base Version**. Use this to begin budgeting for that planning center scenario/activity.
- The **Master Version (Version 4)** starts out as a copy of the **Base Version**. When a version is submitted for review, **BPM** automatically overwrites the submitted version into the **Master Version**.
- A **working version** can be copied to a **Master Version** without submitting it. This is helpful for running reports since the reporting tool points to the **Master Version** data.
- To create a new **working version**, choose another version to copy. Existing versions can be copied into a **working version** for adjustments, rather than always starting from scratch.
- A submitted **working version** becomes the planning center **Master Version** once submitted.
- Agencies may assign multiple **Preparers** to the same planning centers. However, only one **Preparer** can work on a planning center at a time in **My Planning Workspace**. The planning center is locked while a **Preparer** is working on it. If the **Budget Data Load** is being used for updates, it can be loaded by multiple users at the same time for the same planning center. Coordination of **Budget Data Load** updates is critical.
- **Locking and Unlocking a Working Version** – When a version is opened for edits, it is locked automatically so only the current user can make changes. Remember to unlock the version when your changes have been made. This is important because:
    - Only one planning center can be open at a time. The user will not be able to open other planning centers until the current open planning center is unlocked.
    - No other users can open a planning center that is locked by another user.
- The **OBM Budget Analyst** can assist with unlocking planning centers in the event users run into trouble with unlocking.