AGENCY BPM – OPERATING BUDGET
QUICK STEPS

View Planning Center Budget Status (Reviewer)

Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

1. Enter or select Reviewer in the Role Name field.
2. Click Search.
   A list of all models available to someone with the specified role displays.
3. Click the desired Planning Model ID. The My Planning Workspace page displays any
   planning center budgets that have been submitted.
4. Click the Scenario.
5. Select the appropriate option from the Activity drop-down list.
6. Select the appropriate option from the Scenario drop-down list to be reviewed.
7. Click Refresh.
8. Click the Details tab to review when and by whom the planning centers were submitted.
9. Click the My Review Workspace link.
   The Individual Planning Centers page displays.
10. Click the My Preparation Workspace link.
    The high level budget displays. The My Planning Workspace page displays the Base
    Version and Master (current working) Version of the planning center.
11. Click the View link for the Master Version line item.
    The master budget displays. Scroll to the right of the screen to see the current planning
    center budget for both fiscal years being planned.
12. Click the My Workspace link
    The My Planning Workspace page displays again.
    Click the My Review Workspace link.
    The My Planning Workspace page displays the statuses for each line item (ChartField
    string) of a budget. The status can be viewed for each budget model, by line item
    (ChartField string).