

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).