

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.

Optional



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.