AGENCY BPM – CAPITAL BUDGET QUICK STEPS

Entering a Budget Line Item

Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

1. Enter or select **Preparer** in the **Role Name** field.
2. Click **Search**.
3. A list of all models available to someone with the specified role displays.
4. Click the **Scenario** that has a version to which a line item (ChartField string) should be added.
   The **My Planning Workspace** page displays the planning center budgets for that model.
5. Click the **Scenario** that has a version to which a line item (ChartField string) should be added.
   The **Line Item Details** page displays, with the notice "*This version is locked to others while you are editing.*"
6. Verify that **Add Entry** is selected in the **Action** drop-down field, then click **Go**.
   The **Add Line Items** page displays, with information about the current version displayed in the header.
   The new line item (ChartField string) will be added only to this planning center version of the budget.
7. Select an **Account** code for the line item (ChartField string) to be created.
   The **Look Up Account** page displays all account codes, even those that were not used in the previous biennium.
8. Select a **Fund** code.
9. Select a **Department**.
10. Select a **Program Code**.
11. Select a **Service Location**.
12. Select an appropriation line item (**ALI**).
13. Enter **Project**.
14. Select **Project Type**.
15. Select **Priorities**.
16. Click **Add**.
    The line item (ChartField string) is added to the **Line Item Details** page.
17. Scroll to the right of the row to make any revisions to the numbers or delete a number. This is the preferred method.
18. Click **OK**. The amounts are added to the **working version** of this budget.
19. Click the **Save** button.
    The line just updated is highlighted.