

# AGENCY BPM – QUICK STEPS

## Versions

- A **working version** is a working draft of a scenario/activity.
- There is one scenario/activity that the agency must submit for each planning center for capital budgeting: AGYCAP. For each planning center scenario/activity, the agency can create multiple different working versions. Best practice recommends no more than three working versions.
- OBM provides a **base version (version 0)** to start the agency's planning and budgeting.
- **Version 1** is used 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.