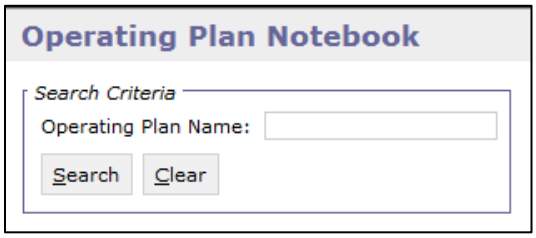
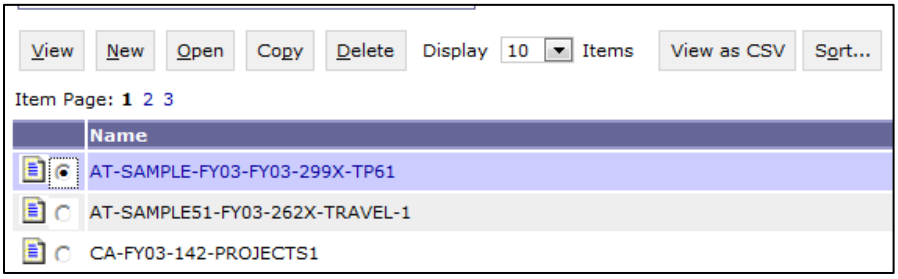
Pegasys Quick Reference Card

Amending Plans: Changing Plan Parameters

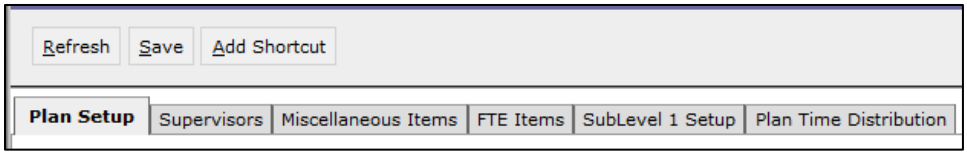
1. Select **Transactions** > **Planning** > **Operating Plan Notebook** from the Pegasys menu bar.
2. Type the name of the plan you want to change in the **Operating Plan Name** field.
3. Click **Search.**



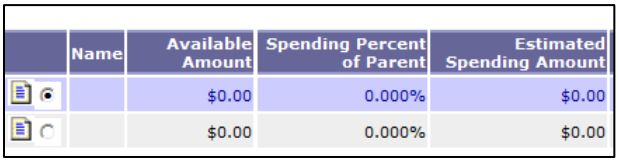
4. Select the plan you want to copy from the search results.
5. Click **Open**.



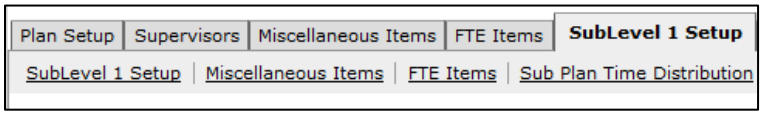
6. Select the **SubLevel 1 Setup** tab of the plan level to be modified.



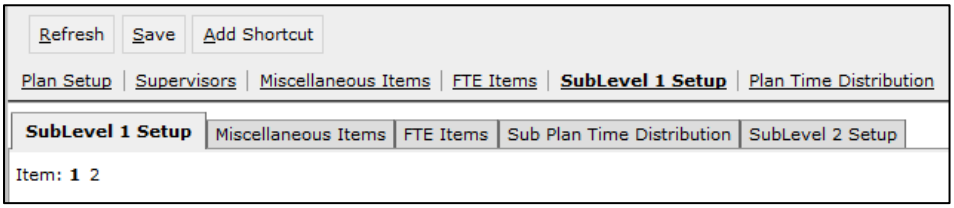
7. Select the **Sub Plan** to be modified.



8. Click the **Sub Level 1 Setup** link.



9. Replace any values that need to be changed.
10. Click the **Sublevel 1 Setup** link to return.

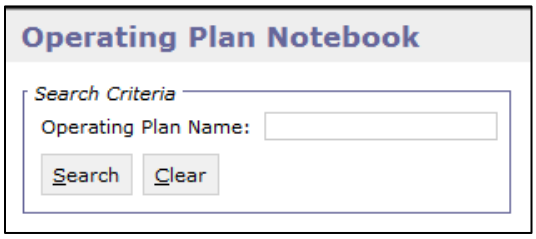


11. Click the **Save** button to save the plan.

AMENDING PLANS: MODIFYING SUPERVISORS

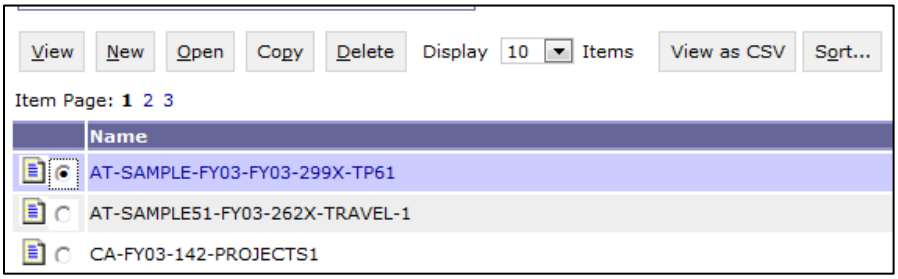
Note: All supervisors are copied from the original plan along with their assigned functions.

1. Select **Transactions** > **Planning** > **Operating Plan Notebook** from the Pegasys menu bar.
2. Type the name of the plan you want to change in the **Operating Plan Name** field.
3. Click **Search.**

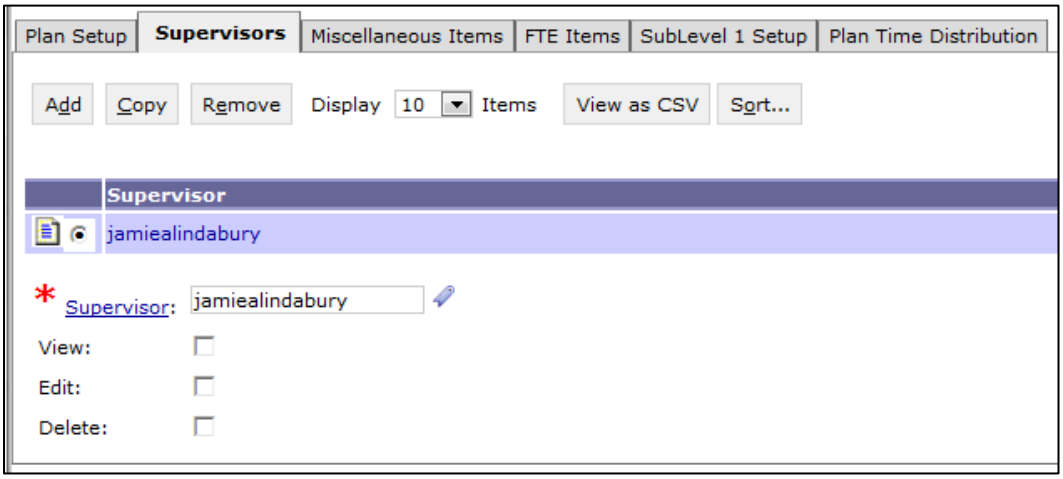
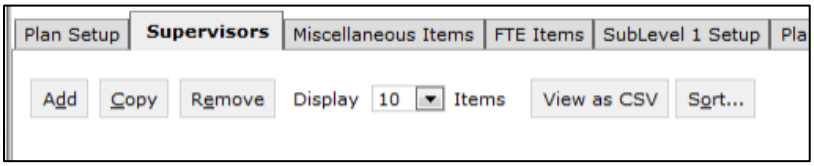


4. Select the plan you want to copy from the search results.

5. Click **Open**.



6. Click the **Supervisor** tab.
7. Select an existing supervisor's name, and click **Remove** to remove it from the list.



8. To create a new supervisor, click **Add**.
9. To populate the Supervisor field, Select the **Supervisor** link, search and select the supervisor.