



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**.

Operating Plan Notebook

Search Criteria

Operating Plan Name:

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

View New Open Copy Delete Display 10 Items View as CSV Sgrrt...

Item Page: 1 2 3

	Name
<input checked="" type="checkbox"/>	AT-SAMPLE-FY03-FY03-299X-TP61
<input type="checkbox"/>	AT-SAMPLE51-FY03-262X-TRAVEL-1
<input type="checkbox"/>	CA-FY03-142-PROJECTS1

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

Plan Setup Supervisors Miscellaneous Items FTE Items SubLevel 1 Setup Plan Time Distribution

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

	Name	Available Amount	Spending Percent of Parent	Estimated Spending Amount
<input checked="" type="checkbox"/>		\$0.00	0.000%	\$0.00
<input type="checkbox"/>		\$0.00	0.000%	\$0.00



Pegasys Quick Reference Card

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

Plan Setup	Supervisors	Miscellaneous Items	FTE Items	SubLevel 1 Setup
<u>SubLevel 1 Setup</u>	<u>Miscellaneous Items</u>	<u>FTE Items</u>	<u>Sub Plan Time Distribution</u>	

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

<u>Refresh</u>	<u>Save</u>	<u>Add Shortcut</u>			
Plan Setup	Supervisors	Miscellaneous Items	FTE Items	SubLevel 1 Setup	Plan Time Distribution
SubLevel 1 Setup	Miscellaneous Items	FTE Items	Sub Plan Time Distribution	SubLevel 2 Setup	
Item: 1 2					

- 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.

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

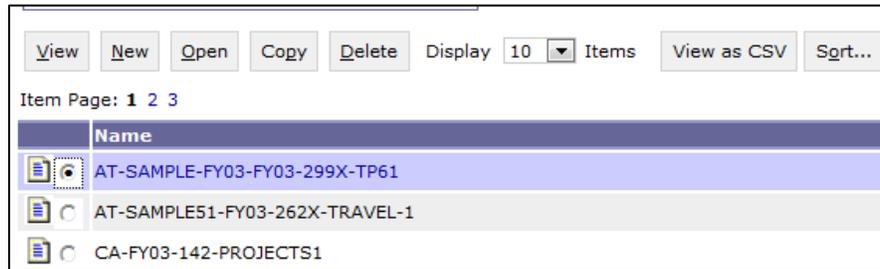
Operating Plan Notebook	
Search Criteria	
Operating Plan Name:	<input type="text"/>
<u>S</u> earch	<u>C</u> lear

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

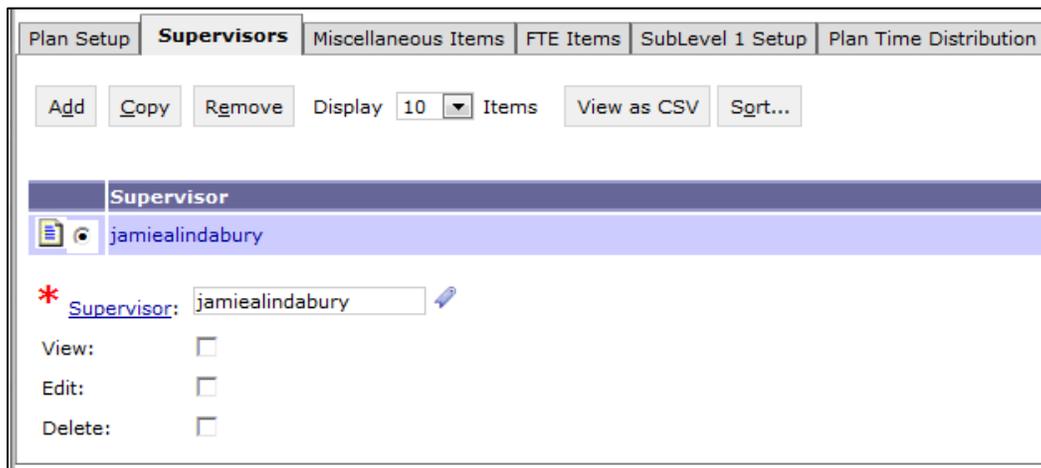


Pegasys Quick Reference Card

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.

