



AMENDING PLANS: ADDING A NEW SUB PLAN

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**.

The screenshot shows a window titled "Operating Plan Notebook". Inside, there is a "Search Criteria" section with a text input field labeled "Operating Plan Name:". Below the input field are two buttons: "Search" and "Clear".

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

The screenshot shows a table with a toolbar at the top containing buttons for View, New, Open, Copy, Delete, Display (10 Items), View as CSV, and Sort... Below the toolbar, it says "Item Page: 1 2 3". The table has a header row with "Name" and three data rows:

	Name
	AT-SAMPLE-FY03-FY03-299X-TP61
	AT-SAMPLE51-FY03-262X-TRAVEL-1
	CA-FY03-142-PROJECTS1

5. Click the **SubLevel 1 Setup** tab of the plan level to be added.

The screenshot shows a toolbar with buttons for Add, Copy, Remove, Display (10 Items), View as CSV, and Sort... The "Add" button is highlighted.

6. Click **Add**.
 - a. The SubLevel 1 Setup page will display.



Pegasys Quick Reference Card

* **Note:** The SubLevel 2 tab is used to add another sublevel to SubLevel 1. If you click on SubLevel 2, another tab for SubLevel 3 will appear, and so on.

The screenshot shows the Pegasys web application interface. The breadcrumb trail is: Pegasys > Transactions > Planning > Operating Plan Notebook > Plan Setup: 106-Limitation-Test > SubLevel 1 Setup: > SubLevel 2 Setup > SubLevel 2 Setup. The 'SubLevel 2 Setup' tab is active. The form is divided into two main sections: 'General' and 'Amounts & Controls'. The 'General' section includes fields for Name, Parent, Start Accounting Period (01/2004), and End Accounting Period (12/2004). The 'Amounts & Controls' section is divided into three columns: 'Spending' (Estimated Spending Amount: \$0.00), 'Collections' (Estimated Collection Amount: \$0.00), and 'FTEs' (Estimated FTEs: 0.000000). Each column has a 'Calculation' dropdown set to 'Fixed' and checkboxes for 'Maintain % for Periods' and 'Distribute Evenly'.

7. Enter a name for the new sub plan in the **Name** field.
8. Populate the **accounting period dates** and any other needed fields.

The screenshot shows the Pegasys web application interface with the 'SubLevel 1 Setup' tab active. The breadcrumb trail is: Pegasys > Transactions > Planning > Operating Plan Notebook > Plan Setup: 106-Limitation-Test > SubLevel 1 Setup: > SubLevel 1 Setup. The 'SubLevel 1 Setup' tab is active. The form is divided into two main sections: 'General' and 'Amounts & Controls'. The 'General' section includes fields for Name, Parent (AT-SAMPLE-FY03-FY03-), Start Accounting Period (01/2003), and End Accounting Period (12/2003). The 'Amounts & Controls' section is divided into three columns: 'Spending', 'Collections', and 'FTEs'. Each column has a 'Calculation' dropdown set to 'Fixed' and checkboxes for 'Maintain % for Periods' and 'Distribute Evenly'.

9. Click the **SubLevel 1 Setup** link to return.



AMENDING PLANS: DELETING A SUB PLAN

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.

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

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

5. Click **Open**.
6. Go to the **SubLevel 1 Setup** page of the appropriate plan.
7. Click the **Sub Plan** to be deleted.

Add Copy Remove Display 10 Items View as CSV Sort...

	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
<input type="checkbox"/>		\$0.00	0.000%	\$0.00

8. Click **Remove**.



REDEFINING A PLAN

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**.
6. Click 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
		\$0.00	0.000%	\$0.00
		\$0.00	0.000%	\$0.00

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

Plan Setup | Supervisors | Miscellaneous Items | FTE Items | **SubLevel 1 Setup**

SubLevel 1 Setup | Miscellaneous Items | FTE Items | Sub Plan Time Distribution

9. Replace any values that need to be changed in the **Dimension Setup** group box.



Pegasys Quick Reference Card

Dimension Setup

BBFY: 2003	EBFY: 	Fund: Fund 299X	Region: 	Org Code:
Sub Organization: 	Program: Program PG61	Project Code: 	Sub Project: 	Activity:
Sub-Object Class: 	Sub Object: 	Revenue Source: 	Sub Revenue Source: 	Building #:
System: 	Vehicle Tag #: 	Work Item: 	Lease #: 	Sub Cost Organization:
Org Code: Code				

10. If a new dimension is added, values must also be added to all other sub plans with the same parent.