AMENDING PLANS: INTRO

- The recommended naming convention for the highest level of a plan is the following:

  user initials-fiscal year-fund-dimension(s)

  - Ex: UIN-FY11-262X-TRAVEL-00

    - *User Initials:* UIN
    - *Fiscal Year*: FY11
    - *Fund*: 262X (if Fund is used)
    - *Dimension:* TRAVEL (Major Object Class)
    - *Dimension*: 00 (Region code)

- Pegasys does not allow spaces in the name of the plan. The dash or underscore may be used to separate words and codes.
- At the top level of the plan, begin the plan name with your initials to aid in identifying your plan. Use all uppercase characters.
- At the lower levels, begin the plan name with S1, S2, etc., to aid in identifying the plan level.
- Baseline all plans in order to track changes.
- Include your initials when citing the reason for making baseline changes.
- When a plan is copied, all supervisors associated with the original plan are also associated with the new plan.
- The accounting period of a plan may span a few months or several years.
- If a plan is enabled sometime after the accounting period start date, a separate plan rebuild process must be performed to update the plan with all relevant transactions.

AMENDING PLANS: COPYING A PLAN

Use the following steps to create a new plan by copying an existing plan. All information copies forward from the existing plan except for its name and accounting period dates.

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

3. Click **Search**.

Operating Plan Notebook

Search Criteria
Operating Plan Name: [   ]

[Search] [Clear]

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

5. Click **Copy**.

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

Item Page: **1** 2 3

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

6. Enter the new plan name in the Operating Plan Name field.

7. Type in the **Start Accounting Period** and **End Accounting Period** or click the links to choose the Previous, Current or Next Accounting Periods. Otherwise, choose **Search** to search for an accounting period.

8. Click **OK**.

[OK]

Operating Plan Notebook

* Operating Plan Name: [   ]

Plan Name To Copy: AT-SAMPLE-FY03-FY03-2

* Start Accounting Period: [   ] ✎

* End Accounting Period: [   ] ✎

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