

## 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.

Fields with red asterisks are mandatory for Pegasys processes, but may not include all fields required by GSA policy.

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 and click **Search**.
3. Select the plan you want to copy from the search results and click **Copy**.
4. The new **Operating Plan Notebook** page displays.

### Operating Plan Notebook Page

#### Operating Plan Notebook

Search Criteria

Operating Plan Name: JIN-FY11-262X-TRAVEL

Name
 JIN-FY11-262X-TRAVEL

5. Enter the new plan name in the **Operating Plan Name** field.
6. Type in or click the **Start Accounting Period** and **End Accounting Period** links to choose the Previous, Current, or Next Accounting Periods otherwise choose Search to search for an accounting period.
7. Click **OK**.

8. The new plan's **Plan Setup** page displays. See the **Creating Plans** Quick Reference Card for further instructions.

## Changing Plan Parameters

1. Select the **SubLevel 1 Setup** tab of the plan level to be modified.
  - *The Sublevel 1 Setup page displays.*

### SubLevel 1 Setup Page

SubLevel 1 Setup | Miscellaneous Items | FTE Items | Sub Plan Time Distribution | SubLevel 2 Setup

Item: 1 2

[Expand All](#) | [Collapse All](#)

General

\* Name: S1- Maintain Other Sub-plan: ☒

\* Parent: UIN-FY11-262X-OTHER Frequency: Quarterly

\* Start Accounting Period: 01/2011 Available Amount: No Collections

\* End Accounting Period: 12/2011

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1. Select the **Sub Plan** to be modified and click the **Sub Level 1 Setup** hyperlink.
2. Replace any values that need to be changed.
3. Enter a new name in the **Name** field if necessary.
4. Return to the **Sublevel 1 Setup** page by clicking the **Sublevel 1 Setup** hyperlink.
5. To save the plan click **Save**. Note: See the **Creating Plans** Quick Reference Card for further instructions.

## Adding a New Sub Plan

1. Select the **SubLevel 1 Setup** page of the plan level to be added.
2. Click **Add**.
3. A new Sublevel 1 Setup page displays.
4. Enter a name for the new sub plan in the **Name** field.
5. Populate the accounting period dates and any other needed fields.
6. Return to the **Sublevel 1 Setup** page by clicking the **Sublevel 1 Setup** hyperlink.

## Deleting a Sub Plan

1. Go to the **SubLevel 1 Setup** page of the appropriate plan.
2. Select the **Sub Plan** to be deleted.
3. Click **Remove**.

Plan Setup | Supervisors | Miscellaneous Items | FTE Items | SubLevel 1 Setup | SubLevel 2 Setup

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

Spending

Estimated Spending Amount: \$500,000.00

Spending Calculation: Total of Sub Plans

Undistributed Amount: \$0.00

Undistributed %: 0.000%

Collections

Estimated Collection Amount:

Collections Calculation:

Undistributed Amount:

Undistributed %:

Plan Available Amount: \$500,000.00 Available Amount: No Collection

10 Items

Name	Available Amount	Spending Percent of Parent	Estimated Sp
S1-	\$200,000.00	40.000%	\$200
S1-ProgramTravel	\$300,000.00	60.000%	\$300

## Redefining a Plan

1. Go to the **SubLevel 1 Setup** page.
2. Select the **Sub Plan** to be modified.
3. Click the **Sub Level 1 Setup** hyperlink.
4. Replace any values that need to be changed in the Dimension Setup group box.
5. If a new dimension is added, values must also be added to all other sub plans with the same parent.
  - *Note: See the Creating Plans Quick Reference Card for further instructions.*

## Using Maintain 'Other' Option

The **Maintain 'Other'** option creates an "Other" sub plan to capture all transactions that meet the criteria for a dimension of the plan but are not defined by a specific value. Suppose a plan contained a Sublevel 1 plan for Regions 00 and 01. Check the Maintain 'Other' box at the plan level to create an "Other" Sublevel 1 plan, which groups together all remaining regions.

### Adding the 'Other' Sublevel Plan

- Check the **Maintain 'Other'** check box at the parent level to create an "Other" plan at a lower level.

### Removing the 'Other' Sublevel Plan

- Uncheck the **Maintain 'Other'** check box at the parent level to remove the existing "Other" plan at a lower level.

## Modifying Supervisors

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

- Click the **Supervisor** tab or link if navigating from another tab.
- The **Supervisors** page displays.
- Select an existing supervisor's name and click **Remove** to remove it from the list.
- To create a new supervisor click **Add** and populate the **Supervisor** field along with the **View**, **Edit**, and **Delete** checkboxes checked where appropriate.

## Planning Pointers

- The recommended naming convention for the highest level of a plan is:  
**user initials-fiscal year-fund-dimension(s)**  
*i.e.*, **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 upper case.
- 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 be a few months or span 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.

## Pegasys Resources

- Functional Coordinator**
- Service Representative**
- Pegasys Web Site**  
<http://pegasys.gsa.gov>
- Pegasys User Guides**
- Quick Reference Cards**
- OCFO Service Desk**  
Email address - [OCFOServiceDesk@gsa.gov](mailto:OCFOServiceDesk@gsa.gov)  
Telephone Number - 1-866-450-6588



**General  
Services  
Administration**

# *The Integrated Financial Management System*



## Pegasys 6.5.0: Amending Plans Quick Reference Card