



Pegasys Quick Reference Guide

Applying Workflow Approvals

Users can only apply approvals to forms that are opened from the **Inbox**. Forms requiring approval will appear in the Inbox as Approve Form tasks.

1. View the **Inbox**.
 - a. If returning to the Inbox from another page in Pegasys, select **Refresh**.

Figure 1: Inbox Page

The screenshot shows the Pegasys user interface. At the top, there is a search bar with the text "Search Forms And Documents" and a user profile icon labeled "allroles148". Below the search bar, a notification states "1 server message(s)" and "Your last successful login was 02/09/2018 15:43:31". The main content area is titled "Inbox" and displays a grid of eight "Approve Form" tasks. Each task card includes the task name, a unique ID, the status (Acquired or Assigned), and the due date. A progress bar is visible at the bottom of each task card.

Task Name	ID	Status	Due Date
Approve Form	ADS ADS2017031500015	Acquired	04/22/2017
Approve Form	R7RWAIP AMI AMIW0016995-001	Assigned	02/09/2017
Approve Form	R6FIT1 IM6 IM6201606060029	Assigned	06/07/2016
Approve Form	FNL FNL2018010800009	Assigned	01/10/2018
Approve Form	MMR MMR2016120200633	Assigned	12/03/2016
Approve Form	EXTSERVICE OMF OMFESI00281-001	Assigned	04/20/2016
Approve Form	R6GRP3 IM6 IM6201412020003	Assigned	12/02/2014
Approve Form	MNLBL IMN IMN7N000031-001	Assigned	03/04/2016

2. Select the task record.



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Figure 2: Inbox Item Details

APPROVE FORM FNL FNL2018010800009 ✕

Task			
Type	Approve Form	Item	FNL FNL2018010800009
Task Description	Approve PENCANCELAPPROVAL FNL FNL2018010800009 Form	Assignment Date	01/09/2018
		Expected Completion Date	01/10/2018
Priority	Medium	Task Status	Assigned
Document			
Document Type	FNL	Amendment/Modification Number	
Document Number	FNL2018010800009	Document Title	Allowance For Loss01/08/2018
Document Date	01/09/2018	Security Organization	GSA
Document Status	PENCANCELAPPROVAL	Form Creation Status	
Total Transaction Amount	\$0.00	Form Creation Step	
Fund Amount	\$0.00	Accounting Period	
Fund Currency	USD	Vendor Code	
Transaction Currency	USD	Vendor Address Code	
Contract Number		Vendor Name	
Blanket Agreement Number			
Classification			
Document Description	SV Generated or Updated on 01/08/2018		
Header Fields			
Assignment Code		Serverable Service/SCAC Code	
Client Phone Number		Short Contract Number (GWAC) Multiyear	
Contract Number			
Bidder's Last Name/Fund Code/Appropriation			

Open and Acquire **View** **Release** ...

3. Select Open and Acquire.
 - a. The form will appear in a read-only mode.
4. Select **Workflow Status** to show any approvals already applied since the form was submitted.



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Figure 3: Header Page - Workflow Status Button

The screenshot shows the Pegasys Header Page for document FNL FNL2018010800009. The page includes a search bar, navigation tabs (Header, Accounting Lines, Approval Routing, Memos, Summary, Correspondence), and a 'General' section with various form fields. A dropdown menu is open over the 'Attachments' button, with 'Workflow Status' highlighted in red. The menu options are: Route, References, Amendment History, Workflow Status, and Approval History.

5. Select **Ok** to go back.

Figure 4: Workflow Status Page

The screenshot shows the Pegasys Workflow Status Page. The breadcrumb trail is 'Cash Receipts / Workflow Status'. The page title is 'Workflow Status'. Under the 'Approvals' section, it shows '1 - 1 of 1 results'. A table with columns 'Approval Type' and 'Approval Tir' contains one entry: 'Collections Approver'. A 'Go to top of Main Content' link is visible. At the bottom, the 'Ok' button is highlighted in red.

6. Select **Approval History** to show the approval log for the form.



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Figure 5: Approval History Page

Approval History

Search Criteria

Approver ☆

Approval Action ▼

Approval Type ☆

1 - 1 of 1 results

Amendment	Approval Type	Approval Action
<input checked="" type="radio"/>		Disapprove

[Go to top of Main Content](#)

7. Select **Ok** to go back.
8. Review the form to ensure it contains the required information.
9. If the form is acceptable, select **Approve**.

Figure 6: Action Buttons - Approve Button

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10. Enter comments on the approval as necessary.
11. These comments will appear in the Memos page on the form/document.
12. Select **Continue**.



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Figure 7: Comments Section

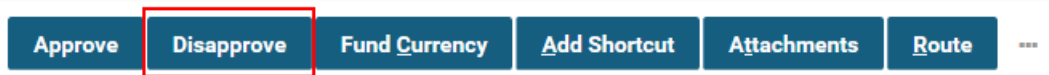
If desired, enter a comment related to the action you have performed.

Continue [Cancel](#)

Comments

13. If the form is unacceptable, select **Disapprove**.

Figure 8: Action Buttons - Disapprove Button



- a. Comments are required when users disapprove a form.
- b. These comments will appear on the Memos page of the form/document.

14. Select **Continue**.

15. The system message “The Work Item has been completed” indicates that the workflow action to approve or disapprove was successfully submitted.