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

2. Select the task record.

Figure 2: Inbox Item Details

APPROVE FORM FNL FNL2018010800009 ✕

Task

Type	Approve Form	Item	FNL FNL2018010800009
Task Description	Approve PENDCANCELAPPROVAL FNL FNL2018010800009 Form	Assignment Date	01/09/2018
		Expected Completion Date	01/10/2018
		Task Status	Assigned
Priority	Medium		

Document

Document Type	FNL	Amendment/Modification Number	
Document Number	FNL2018010800009		
Document Date	01/09/2018	Document Title	Allowance For Loss01/08/2018
Document Status	PENDCANCELAPPROVAL		
Total Transaction Amount	**$0.00**	Security Organization	GSA
Fund Amount	**$0.00**	Form Creation Status	
Fund Currency	USD	Form Creation Step	
Transaction Currency	USD	Accounting Period	
Contract Number		Vendor Code	
Blanket Agreement Number		Vendor Address Code	
Classification		Vendor Name	
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)
Contract Number		Multiyear
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.

Figure 3: Header Page - Workflow Status Button

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

Figure 4: Workflow Status Page

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

Figure 5: Approval History Page

Approval History

Search Criteria

Approver	☆
Approval Action	⌄
Approval Type	☆

[Search] [Clear]

1 - 1 of **1** results

Amendment	Approval Type	Approval Action
◉		Disapprove

Go to top of Main Content

[Ok]

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

[Approve] [Disapprove] [Fund Currency] [Add Shortcut] [Attachments] [Route] ⋯

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

Figure 7: Comments Section
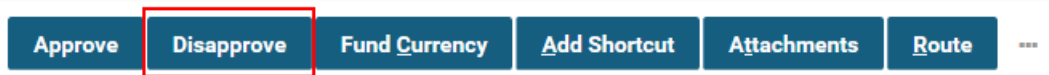
If desired, enter a comment related to the action you have performed.

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.