



Pegasys Quick Reference Guide

Attaching a Document: Intro

- Pegasys allows users to add attachments to most forms and documents. The attachment may be in a variety of formats such as a Word document, PDF or Excel spreadsheet. Once the document is attached, it can be viewed in Pegasys by users **with the proper credentials**.
- The following queries and notebooks also permit attachments:
 - o Agreement Query
 - o Project Notebook/Query
 - o Initiative Notebook/Query
 - o Planning Notebook/Query
 - o Credit Card Reconciliation Notebook
 - o Credit Card Log
 - o Document Level Reorganization Notebook
 - o Global Level Reorganization Notebook
 - o Blanket Agreement Query
 - o Contract Query

A processed document does not require a document to go through the approval process again when adding an attachment.

Attaching a Document

1. Open an existing form, and select the **Attachments** button.



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Figure 1: Attachments Button

— General

Document Type: 2C VITAP-FTS Receiving Report

Status: CORRECT

Document Number: 2C20170428000086

Title: 2466461V

* Received By: ANTIONETTE DELOACH

Invoice #: 10382466461V

Invoice Date:

Disbursing Office: AU7 Automatic Reversal

Reversal Accounting Period:

Reverse After Period:

Agency DUNS Number:

... Add Shortcut

Attachments

+ Generate Template Report

References

Workflow Status

Approval History

Verify Save Submit Schedule Refresh Fund Currency ...

2. Select the **Import Local File** button.

Figure 2: Import Local File Button

No results

<input type="checkbox"/> Attachment Identifier	Name	Title	Number of Pages
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Return **Import Local File** Attachment Access Repository Delete Check Out ...

— Document Information

* Attachment Identifier:

* Title:

Location:

Number of Pages:

* Attachment Date:



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3. Enter a **Title**.
4. Select the **Browse** button to find the document to attach.

Figure 3: Browse Button

* Attachment Identifier

* Title

Number of Pages

Attachment Date

Location

File

Sensitive

Attachment

Attachment Type

Draft/Final

Explicit Access

Export Controlled

Is CD Available

5. Select the **Upload** button.
 - a. The **Attachment** button will indicate the number of attachments on the **Header Page**.

NOTE: Repeat steps to add multiple attachments.

NOTE: If you receive an error stating “An error occurred while adding an attachment from the repository,” visit the **Removing Orphaned Attachments** section.



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Figure 4: Form with Attachment

The screenshot shows a 'General' form with the following fields and values:

- Document Type: 2C (dropdown), VITAP-FTS Receiving Report (text)
- Status: CORRECT (dropdown)
- Document Number: 2C20170428000086 (text)
- Title: 2466461V (text)
- * Received By: ANTONETTE DELOACH (text)
- Invoice #: 10382466461V (text)
- Invoice Date: (calendar icon)
- Disbursing Office: AU7 (dropdown), (star icon)
- Automatic Reversal:
- Reversal Accounting Period: (dropdown), (star icon)
- Reverse After Period: (text)
- Agency DUNS Number: (text)

An attachments dropdown menu is open on the right, showing:

- Add Shortcut
- Attachments (1) (highlighted with a red box)
- + Generate Template Report
- References
- Workflow Status
- Approval History

At the bottom of the form are buttons: Verify, Save, Submit, Schedule, Refresh, Fund Currency, and a menu icon (three dots).

Attaching a Document: Limiting Access

1. Open an existing form, and select the **Attachments** button.
2. Select the **Import Local File** button.
3. Enter a **Title**.
4. Select the **Browse** button to find the document to attach.
5. Check the **Sensitive** checkbox if you want to limit the document to only designated users.
 - a. The user uploading the document is automatically granted Attachment Manager Permissions on the specific attachment and also receives the ability to view, edit and delete the file and grant access for the attached file to other users. The security settings are unrelated to other budget roles in Pegasys.
6. Select the **Upload** button.
 - a. The **Attachment** button will indicate the number of attachments on the **Header Page**.

NOTE: Repeat steps to add multiple attachments.

NOTE: If you receive an error stating “An error occurred while adding an attachment from the repository,” visit the **Removing Orphaned Attachments** section.



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Figure 5: Sensitive Flag

* Attachment Identifier

* Title

Number of Pages

Attachment Date

Location

File

Sensitive

Attachment

Attachment Type ☆

Draft/Final ▾

Explicit Access

Export Controlled

Is CD Available

7. Select the document, and select the **Attachment Access** button.

Figure 6: Attachment Access Button

1 - 2 of 2 results

<input type="checkbox"/>	Attachment Identifier	Name	Title	Number of Pages	Attachment	Sensitive	Check Out Status	Extension Type
<input type="checkbox"/>	1	Attachment 1.docx	Attachment 1	1	False	False	False	docx
<input type="checkbox"/>	2	Attachment 2.docx	Attachment 2	1	False	True	False	docx

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Document Information

* Attachment Identifier

* Title

Location

Number of Pages

8. Select **Add** to add a user with attachment access.
9. Enter or search for a **Principal ID** and check **View**, **Edit** and /or **Delete** checkboxes based on what type of access you want the user to have.
10. Select the **Previous** button to return to the Attachment screen.
 - a. Select the **Copy** button to copy the permissions for another user.
 - b. Select the **Remove** button to remove a user.
11. Select **Save**.
12. Select **Return** on the Attachments screen to return to the form.



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Removing Orphaned Attachments

When an attachment is uploaded to a form and the form is closed prior to saving, the attachment file(s) are created in the attachment repository and are not linked to any active document. This is referred to as an “Orphaned Attachment”. Typically, the system will issue an error when a user attempts to upload the same attachment in a new form, preventing the same attachment name from being uploaded.

The Attachment Improvement enhancement adds a new GSATCHRMVL batch process to purge existing unreferenced attachments from the attachment repository. This streamlines the process for removing unreferenced attachments. Rather than manually deleting individual unreferenced attachments, the GSATCHRMVL batch process can purge them on a regular basis.

USDA will run this batch process on a Monthly basis to purge Orphaned Attachments.

The batch process will be run:

- First in Preliminary Mode (P), to review Orphaned Attachments.
- Then, the batch process will be run in Final Mode (F) to purge the attachments.

When the GSATCHRMVL batch process is run in Preliminary (P), report results are saved to a predetermined file location. Users can review the identified attachments prior to running the GSATCHRMVL batch process in Final (F) mode.

Figure 7: Reviewing Attachment Removal Batch Process Results

The screenshot shows the 'Batch Job Maintenance' page in the Pegasys system. The breadcrumb trail is 'Momentum / Utilities / Batch Execution / Batch Jobs / Batch Job Maintenance'. The current user is 'RANK4 : MIDLEVEL4 ULTRA'. The page is divided into 'Batch Job Maintenance' and 'Simple Parameters' tabs. Under 'Simple Parameters', the following fields are visible: Process Code (GSATCHRMVL), Job Name (GSATCHRMVL), Process Name (Attachment Removal), and Security Org (GSA). The 'Report Options' section includes several checkboxes: 'Save Report to Database' (unchecked), 'Save Report to File' (checked), 'Save Timestamp to File' (unchecked), and 'Generate File Name' (unchecked). The 'Batch File Location' dropdown menu is highlighted with a red box and contains the value 'AttachRemoval'. Other fields include 'Name Format' (empty), 'Name' (GSAtchRmvl.rpt), 'Saved Output Format' (PDF), and 'Report Output View Access' (Private). At the bottom, there are 'Save', 'Run', and 'Execution' buttons.