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:
  - Agreement Query
  - Project Notebook/Query
  - Initiative Notebook/Query
  - Planning Notebook/Query
  - Credit Card Reconciliation Notebook
  - Credit Card Log
  - Document Level Reorganization Notebook
  - Global Level Reorganization Notebook
  - Blanket Agreement Query
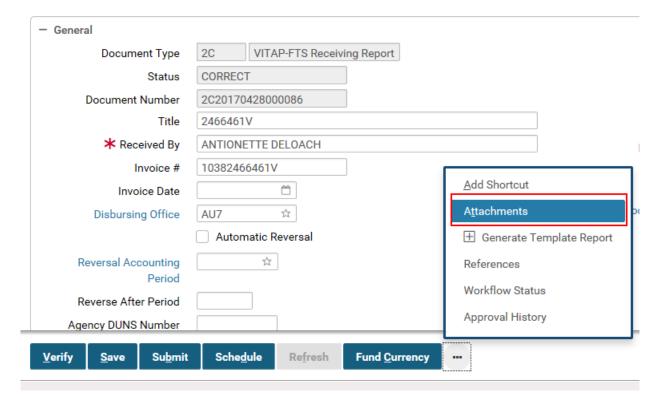 - Contract Query

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

Attaching a Document

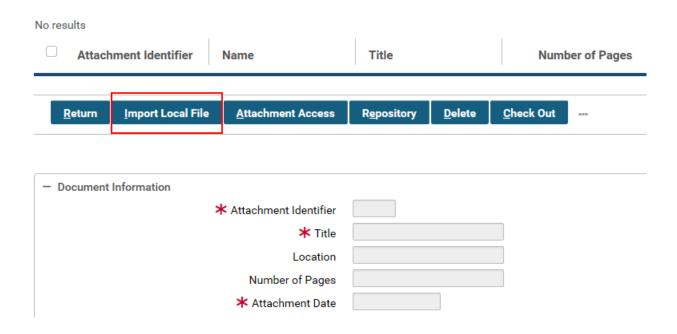1. Open an existing form, and select the **Attachments** button.

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Figure 1: Attachments Button
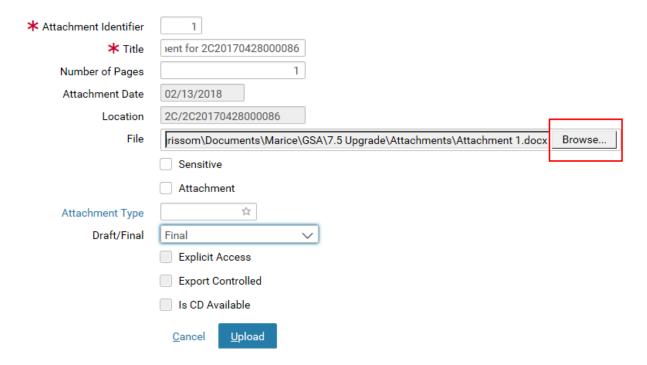

2. Select the **Import Local File** button.

Figure 2: Import Local File Button

3. Enter a **Title**.

4. Select the **Browse** button to find the document to attach.

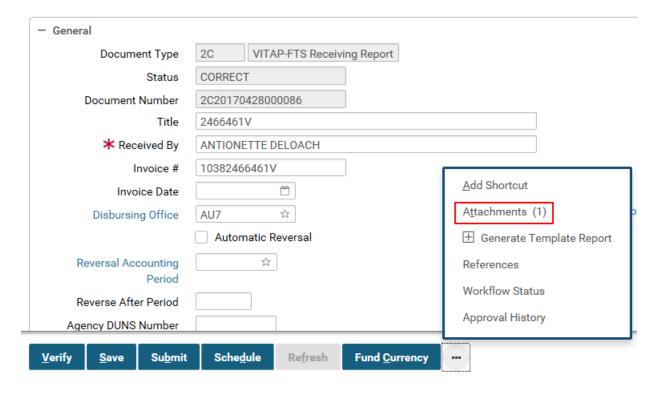**Figure 3: Browse Button**

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.

Figure 4: Form with Attachment
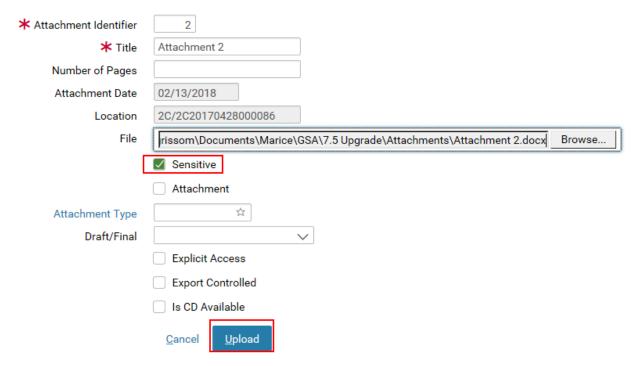

Attaching a Document: Limiting Access

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.

Figure 5: Sensitive Flag

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

Figure 6: Attachment Access Button

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.

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