



Pegasys Quick Reference Guide

Creating a Purchase Request: Intro

- The request records the intent to buy goods or services. While the request is not legally binding, it commits funds for a future purchase.
- Fields with red asterisks (*) are mandatory for Pegasys processes but may not include all fields required by GSA policy.
- In Pegasys, users create one document type to record both non-itemized and itemized transactions.
- For detailed information, please refer to the Reservations and Requests chapter of the Purchasing User Guide.

GSA Policy

- All requests require the following approvals: Accounting Classification, Funds Authorization and Manager.
- The Vendor Code field is optional on the request. Use the Suggested Vendors page to recommend vendors.
- If needed, the user can list additional Suggested Vendors in an attachment.
- If vendor is not listed in the Vendor Maintenance table, contact your Finance Center to have the vendor set up in Pegasys.
- The Requisitioner and the name entered on the Delivery office address tab page will receive an email notification if receipt is not logged at the time the invoice is logged.

Creating a Purchase Request

1. Select **Transactions** → **Purchasing** → **New** → **Request** from the Pegasys menu bar.
2. Enter **PR** in the Document Type field.
3. Select **Generate**.
4. Leave the Security Org and Document Title fields blank.
 - a. The user's default Security Org will populate the field on the Header page. The default Security Org is GSA.
5. Select **Finish** to display the form's Header page.



Pegasys Quick Reference Guide

Figure 1: New Request Page

Pegasys / Transactions / Purchasing / New / **New Request**

New Request

* Document Type

Document Number Format Prefix

Document Number Format Team

Security Org

* Document Number

Title

Copy Document None
 Copy From
 Copy Forward

File

6. Enter the requester's name in the **Authorized By** field.
 - a. **Request Date**, **Accounting Period** and **Reporting Accounting Period** fields will default to the current date when the form is Verified or Processed.

Figure 2: Header Tab

Header [Office Addresses](#) [Credit Cards](#) [Suggested Vendors](#) [Header Accounting Lines](#) [Itemized Lines](#) [...](#)

— General

Document Type	<input type="text" value="PR"/> <input type="text" value="Purchase Request"/>	Request Date	<input type="text"/>
Status	<input type="text" value="NEW"/>	Accounting Period	<input type="text"/>
Document Number	<input type="text" value="PR201802190000"/>	Reporting Accounting Period	<input type="text"/>
Number Description	<input type="text"/>	Batch Number	<input type="text"/>
Title	<input type="text"/>	Document Classification	<input type="text"/>
Authorized By	<input type="text"/>	Security Org	<input type="text" value="GSA"/>
Agency DUNS Number	<input type="text"/>	<input type="checkbox"/> Suppress Printing	
Agency DUNS+4	<input type="text"/>		

7. Enter or search for the **Vendor Code** in the Vendor Information box.
 - a. To search for a Vendor Code, select the **Code** reference field link. Enter the appropriate search criteria, and select the **Search** button.
 - b. Select the **Select** button for the vendor you wish to add.
 - c. If you have Favorites set up, select a vendor from your list.



Pegasys Quick Reference Guide

Figure 3: Vendor Section

— Vendor Information

Vendor

Code

Address Name

Customer Account

- Codes for suggested vendors can be entered by selecting the **Suggested Vendors** tab and selecting **Add**.

Figure 4: Suggested Vendors Tab

Header Office Addresses Credit Cards **Suggested Vendors** Header Accounting Lines Itemized Lines

Suggested Vendor

No results

Vendor Code	Address Code
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- Enter the **Contract Number** in the Contracts group box.

Figure 5: Contracts Section

— Contracts

Contracts Number <input type="text"/>	<input type="button" value="View Contract / Blanket Agreement"/>
Blanket Agreement Number <input type="text"/>	<input type="button" value="Default Contract / Blanket Agreement To Lines"/>
Delivery Order Number <input type="text"/>	Suggested Preference Program <input type="text"/>
Schedule Number <input type="text"/>	Suggested Type Of Contracts <input type="text"/>
Start Date <input type="text"/>	Min Guarantee Award Quantity % <input type="text"/>
End Date <input type="text"/>	Min Guarantee Award Quantity <input type="text"/>
Procurement Plan Number <input type="text"/>	Max Ceiling Award Quantity <input type="text"/>
Type of Action <input type="text"/>	Min Guarantee Award Amount % <input type="text"/>
Priority <input type="text"/>	Min Guarantee Award Amount <input type="text"/>
Priority Rating <input type="text"/>	Minimum Quantity <input type="text"/>
<input type="checkbox"/> Update Blanket Agreement	
Primary NAICS <input type="text"/>	
Estimated Contract Value Amount <input type="text"/> \$0.00	



Pegasys Quick Reference Guide

10. Select the **Office Addresses** tab.
11. Select the appropriate **Office Type**.
12. Select the **Office Address** link.

Figure 6: Office Addresses Tab

Office Type	Office	Address Code	Address Name	Address Line 1	City	State	Postal Code	County	Country
<input checked="" type="radio"/> COR									
<input type="radio"/> Delivery									
<input type="radio"/> Issue									
<input type="radio"/> Request									
<input type="radio"/> Property									
<input type="radio"/> Invoice									

13. Enter the appropriate **address code** in the **Code** field.
14. Select **Address** to populate the fields in the Address Information section.

Figure 7: Office Address Sub Tab

15. To return to the Office Addresses page, select the **Office Addresses** link.
 - a. To enter multiple office addresses, repeat steps 12-15.
16. Select the **Header Accounting Lines** tab.
17. Select **Add**.



Pegasys Quick Reference Guide

Figure 8: Header Accounting Lines Tab and Sub Tab



18. Enter the dollar amount in the **Requested** field.

Figure 9: Requested Field

	Current Amount
Requested	<input type="text" value="\$0.00"/>
Applied Credit	<input type="text" value="\$0.00"/>
Net Total	<input type="text" value="\$0.00"/>

19. Enter the **Template** in the Accounting Dimensions group box.

- a. To Search, select the **Template** link. Enter the applicable search criteria, and select **Search**. Find the appropriate template record, and select the corresponding **Select** button. The selected template will populate in the Template field.

NOTE: Select the Default button to populate the template field if using a template from your favorites.

Figure 10: Accounting Dimensions Section

20. Enter any other required accounting elements or Agreements.

21. Enter necessary information in the **Description** field.

22. Select the **Header Accounting Lines** link to return.

23. To add additional accounting lines, repeat steps 18-24.



Pegasys Quick Reference Guide

- a. A line may be copied by selecting the desired line and selecting **Copy**. Select the newly copied line, select the **Header Accounting Lines** page and make the necessary modifications.
 - b. A line may be deleted by selecting the appropriate line and selecting **Remove**.
24. Select the **Summary** tab to view a summary of the header accounting lines or to make changes.
25. Select the **Approval Routing** tab.
26. Select **Add User** or **Add Routing List**.

Figure 11: Approval Routing Tab

Header Office Addresses Credit Cards Suggested Vendors Header Accounting Lines Approval Routing ---

No results

Approver Name Approver Id

Add Routing List Add User Remove 10 per page

27. Enter the appropriate search criteria, and select **Search**.

Figure 12: Search Criteria Section

Search Criteria

* Code

Name

Search Cancel

28. Select checkbox to the left of the user or routing list you wish to add.



Pegasys Quick Reference Guide

Figure 13: Item Collection Table

1 - 10 of 537 results

<input type="checkbox"/> Code	Name
<input checked="" type="checkbox"/> *	yvonnescott
<input type="checkbox"/> *R110GC*	Region 11 Counsel's Ofc
<input type="checkbox"/> 001	PR APPROVAL NLGRF
<input type="checkbox"/> 04552761	Purchase Request
<input type="checkbox"/> 05FF-08	5FF08 CERTIFIED INVOICE
<input type="checkbox"/> 08A-GMA-JW	GM&A Acquisition Request-Worthy
<input type="checkbox"/> 1	MyRoutingList
<input type="checkbox"/> 10000D7	D7 routing list
<input type="checkbox"/> 10FF	Fleet Management

29. Select **Save** and then **Verify**.

a. Correct any errors that are displayed.

30. Select **Submit**.

Figure 14: Action Buttons

