



Pegasys Quick Reference Guide

Creating a Training 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 either non-itemized or itemized transactions.
- For detailed information, please refer to the Reservations and Requests chapter of the Purchasing User Guide.

GSA Policy

- All training orders require Accounting Classification, Funds Authorization, Manager and Training Coordinator approvals.
- 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 a 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 in the on the Delivery office address type page will receive email notification if receipt is not logged at the time the invoice is logged.

Creating a Training Request

1. Select **Transactions** → **Purchasing** → **New** → **Training Request** from the Pegasys menu bar.
2. Enter **TR** into the **Document Type** field.
3. Select **Generate**.
 - a. Leave the Security Org and Document Title fields blank.



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Figure 1: New Training Request

Pegasys / Transactions / Purchasing / New / New Training Request

New Training Request

* Document Type

Document Number Format Prefix

Security Org

* Document Number

Title

Copy Document None
 Copy From
 Copy Forward

File

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4. Select **Finish**.
 - a. The user's default Security Org (which is GSA) will populate the field on the Header page.
5. Enter the requester's name in the **Authorized By** field in the General group box.
 - a. Reporting Acctg Period will default to current date when the form is Verified or Processed. The Date fields will default to the current date when the form is Verified or Processed.



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Figure 2: General Section for Training Request

— General

Document Type	TR Training Request	Request Date	<input type="text"/>
Status	NEW	Accounting Period	<input type="text"/>
Document Number	TR20180226001	Reporting Accounting Period	<input type="text"/>
Title	<input type="text"/>	Batch Number	<input type="text"/>
* Authorized By	<input type="text"/>	Document Classification	<input type="text"/>
		Security Org	GSA
		<input type="checkbox"/> Suppress Printing	

- In the Vendor Information group box, enter the vendor’s **Taxpayer Identification Number** and **address code** into the Code fields (if applicable). Enter any other relevant information.

Figure 3: Vendor Information

— Vendor Information

Vendor

Vendor [More](#)

Address Name

- If applicable, specify the information from a contract or delivery order in the **Contracts** group box.

Figure 4: Contracts

— Contracts

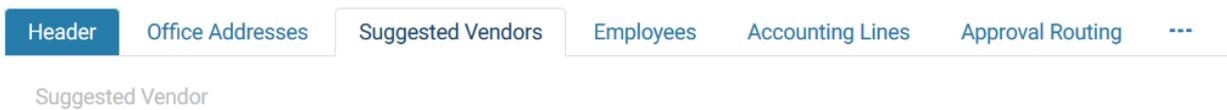
Contracts Number	<input type="text"/>	View Contract / Blanket Agreement
Blanket Agreement Number	<input type="text"/>	
Delivery Order Number	<input type="text"/>	Default Contract / Blanket Agreement To Lines
Schedule Number	<input type="text"/>	
Start Date	<input type="text"/>	
End Date	<input type="text"/>	
Procurement Plan Number	<input type="text"/>	
Type of Action	<input type="text"/>	
Priority	<input type="text"/>	
Priority Rating	<input type="text"/>	
<input type="checkbox"/> Update Blanket Agreement		



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8. Select the **Suggested Vendors** tab.
 - a. Add a new line by selecting the **Add** button.
 - b. Once a line has been created, the line may be modified by selecting the line on the **Suggested Vendors** page, selecting the **Suggested Vendors** link and making the appropriate changes.

Figure 5: Suggested Vendor Tab



9. Enter or search for the vendor code in the **Code** field.

Figure 6: Enter Suggested Vendor

Suggested Vendor

Item: 1 2

— Vendor

Vendor	<input type="text"/>	<input type="text"/>	<input type="button" value="More"/>
Address Name	<input type="text"/>		

10. Select the **Office Addresses** tab.
11. Select the appropriate **Office Type** to enter the **Requesting** and **Issuing** office (procurement office) address information.
 - a. A COTR address may also be added.
12. Select the **Office Address** link.



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Figure 7: Office Addresses

Header Office Addresses Suggested Vendors Employees Accounting Lines Approval Routing ...

Office Address

1 - 3 of 3 results

Office Type	Office	Address Code	Address Name	Address Line 1	City	State	Postal Code	County	Country
<input type="radio"/> COR									
<input type="radio"/> Issue									
<input type="radio"/> Remit To									

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13. Enter the appropriate address code in the **Code** field.

14. Select **Update Address**.

Figure 8: Update Office Address

Office Address

Item: 1 2 3 Item 1 of 3

Expand All Collapse All

— General

Default Mailing Address Update Address Clear Address

Office Type COR

Code

AAC/DODAAC

Standardized Format Yes

Address Name

Address Line 1

15. Select the **Course Information** link.

16. Enter the **Course** and **Title** in the General group box.

17. If applicable, enter the **Program Office** and **Class Sequence**.



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Figure 9: Course Information

— General

* Course ☆

* Course

* Title

Program Office

Class Sequence

18. Enter the **Start Date** and **End Date** for the training course.

19. Enter a **Drop Date** for the course, if one exists.

Figure 10: Course Dates

— Course Dates

Start Date

End Date

Drop Date

20. Enter the **Duty** and **Non-duty** hours in the **Course Hours** group box.

Figure 11: Course Hours

— Course Hours

During Duty

Non-duty

Total

21. Enter the **Training Address**, or check the **Address Same As Vendor** box.



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Figure 12: Enter Training Address

— **Training Address**

Standardized Format Address Same As Vendor

Address Name

Address Line 1

- 22. Enter the **Objective** and **Benefits** of the training course.
- 23. Select the **Employees** tab to enter employees who will attend the class.
- 24. Select **Add**.

Figure 13: Add Employees

Header Office Addresses Suggested Vendors **Employees** Accounting Lines Approval Routing ...

No results

<input type="checkbox"/> Code	Last Name
-------------------------------	-----------

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- 25. Enter the appropriate employee information, and select **Search**.

Figure 14: Employee Search Criteria

Search Criteria

Employee

First Name

Middle Name

Last Name



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26. Choose an employee from the **Employees Search** screen, and select **Select**.

Figure 15: Search Results Displayed

1 - 1 of 1 results

<input type="checkbox"/>	Employee	First Name
<input checked="" type="checkbox"/>	100089844	JOVANKA

Select

27. Select the **Accounting Lines** tab.

28. Select **Add**.

Figure 16: Accounting Lines

Header Office Addresses Suggested Vendors Employees **Accounting Lines** Approval Routing ...

Accounting Line

1 - 1 of 1 results

<input type="checkbox"/>	Line Number	Amount	Transaction Type	Accounting Template	BBFY	EBFY	Fund	Reg	Org
<input type="checkbox"/>	1	\$0.00							
Total Header Funded Amou		\$0.00							

References... **Add** Copy Remove Reset Replace 10 per page Page 1 of 1

29. Enter the **Start Date** and **End Date** in the **Period of Performance** box, if applicable.

Figure 17: Period of Performance

Period of Performance

Start Date

End Date

30. Enter the **Requested** field in the **Line Amounts** group box.



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Figure 18: Line Amounts

— Line Amounts

	Current Amount
Requested	\$0.00
Applied Credit	\$0.00
Net Total	\$0.00

31. In the **Accounting Dimensions** section, enter the **Template**.

- 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.

Figure 19: Accounting Dimensions

— Accounting Dimensions

* Template Default

32. Enter the referenced **RWA** or **IBAA Agreement** information in the Agreement box (PBS only).

Figure 20: Agreement

— Agreement

Agreement Number Agreement Line Number

33. Fill in the **Contract Line Info** section, if the request is to be associated with an existing contract.



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Figure 21: Contracts Line Info

— Contracts Line Info

Contracts Number	<input type="text"/>	☆
Blanket Agreement Number	<input type="text"/>	☆
Delivery Order Number	<input type="text"/>	☆
Contracts Line Item Number	<input type="text"/>	☆
Sub-Contracts Line Item Number	<input type="text"/>	☆
Blanket Agreement Line Item Number	<input type="text"/>	☆
Sub Blanket Agreement Line Item Number	<input type="text"/>	☆
Exhibit Contract Line Item Number	<input type="text"/>	☆
Exhibit Blanket Agreement Line Item Number	<input type="text"/>	☆

[View Contract / Blanket Agreement](#)

34. Select the **Summary** tab to view or make changes to the header accounting lines.

Figure 22: Summary Tab

Header Office Addresses Suggested Vendors Employees Accounting Lines **Summary** ...

Header Accounting Lines
1 - 1 of 1 results

<input type="checkbox"/>	Line Number	Total Requested Amount	Transaction Type	Accounting Template	ATA
<input checked="" type="checkbox"/>	1	<input type="text" value="\$0.00"/>			

35. Select the **Approval Routing** tab.

36. Select **Add User** or **Add Routing List**.



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Figure 23: Approval Routing

The screenshot shows a navigation bar with tabs: Header, Office Addresses, Suggested Vendors, Employees, Accounting Lines, and Approval Routing (selected). Below the tabs, it says "No results". There is a search bar with a checkbox and labels "Approver Name" and "Approver Id". At the bottom, there are buttons: "Add Routing List", "Add User", and "Remove". On the right, there is a "10 per page" dropdown and navigation arrows.

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

Figure 24: Search Criteria for User ID

Search Criteria

The form has two input fields: "User ID" and "Name". Below the fields are two buttons: "Search" and "Cancel".

38. Select **Select** to select the user or routing list you wish to add.

Figure 25: Select Principal ID

1 - 10 of 54 results

The list shows a search result for "Principal ID". The first result, "jamesdebusk", is selected, indicated by a green checkmark in a box.

39. Select **Save** and then **Verify**.

- a. Any errors will be displayed. If necessary, correct the errors and select to Verify again.

40. Select **Submit**.



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Figure 26: Submit Button

