



# Pegasys Quick Reference Guide

## Getting Started with Pegasys

Pegasys is compatible with Microsoft Internet Explorer 8, 9, 10 & 11; Mozilla Firefox 4 and higher; and Google Chrome.

### Signing In

1. Open your web browser, and go to <http://corporateapps.gsa.gov/>.
2. Under the **Applications** menu at the top of the screen, choose **Financial Apps** → **Pegasys** → **Login**.
3. Enter your Pegasys User ID in the User ID field (all lowercase).  
**NOTE:** GSA users will be logged in via Single Sign On.
4. Enter your Pegasys password in the Password field (case sensitive and without spaces).
5. Select the **Sign In** button.

**Figure 1: Login Page**

User ID

Password

[Forgot Password](#)

**Sign In**

**NOTE:** If Pegasys finds an existing session for your User ID, a notification will appear. To close the existing session, select the **Continue** button. The previous session will close, and you will be signed in.

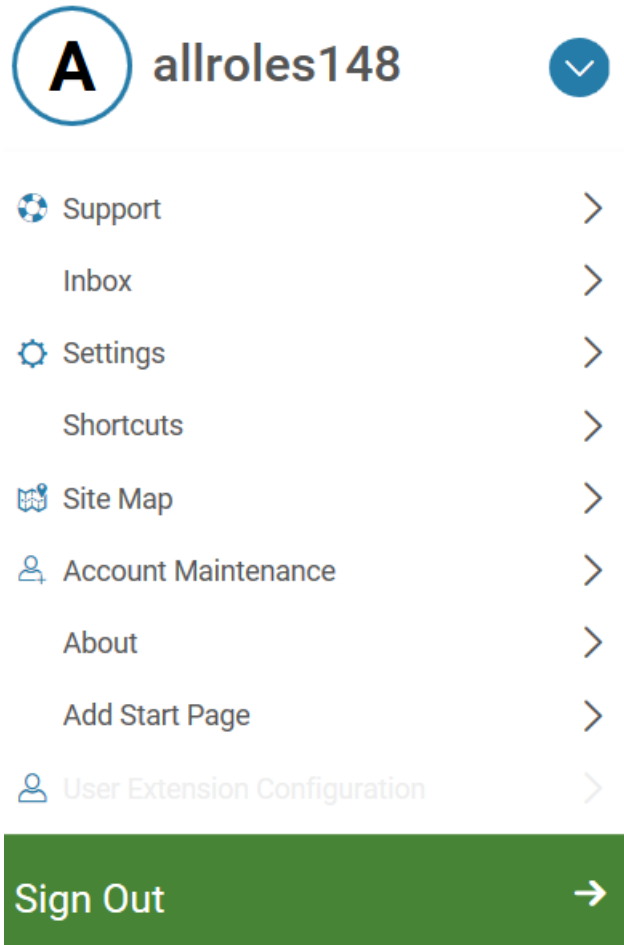
### Signing Out

1. In the User ID Dropdown, select the **Sign Out** hyperlink.



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Figure 2: User ID Dropdown



**NOTE:** Use the Sign Out button before closing the browser in order to close Pegasys properly. Selecting the “x” button first might cause an error when returning to Pegasys.

## Menu Bar

The Pegasys Subsystems are organized within the menu bar which consists of six buttons. These are home, transactions, queries, references, system administration, and utilities. These can be found on the left side of the page or on the top of the page.



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**Figure 3: Menu Bar**



**NOTE:** The display of the menu bar can be changed by navigating to the User ID Dropdown and then selecting Settings. Within the settings page is a Side Navigation flag which when enabled, will display the menu bar vertically along the left side of Pegasys. If this flag is marked false, the menu will appear horizontally at the top of Pegasys.

**Figure 4: Change Menu Bar Display**

Pegasys / Home / **Settings**

Settings   Bookmarks   Advanced Options   Document Defaults   Office Defaults   Workflow Options   ...

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— Tabbing

Enable Expert User Tabbing

Enable Auto Tabbing

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— Menu

Avatar

Side Navigation



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Figure 5: Horizontal Menu Bar



## Menu Bar Options:

- **Transactions**
  - Allows users to create, amend, correct, view, delete, review and cancel forms and documents by subsystem.
- **Queries**
  - Allows users to search for specific information by category.
- **Reference**
  - Provides access to reference data tables by category.
- **System Administration**
  - Provides access to sub categories such as approvals, batch setup, configuration, security and workflow.

**NOTE:** System Administration does not appear for all users.

- **Utilities**
  - Provides access to standard Pegasys report subscriptions, ad hoc reports, batch executions, manage external documents and access external applications. Users can also print certain forms, documents and reports from this menu.
- **Bookmarks**
  - **This item only appears if the user has any saved bookmarks.** Shows a drop-down menu of all saved bookmarks and offers users the option to organize their bookmarks.



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Figure 6: Bookmarks

The screenshot shows the top navigation bar of the Pegasys application. The user profile is displayed as 'A allroles126'. A dropdown menu is open, showing 'Bookmarks' and 'Settings' options. Below the navigation bar, the main content area displays 'Pegasys' and a table of categories.

Transactions	Queries	Reference	System Administration
Accounts Payable	Accounts Receivable	Accounts Payable	Administration
Accounts Receivable	Automated Disbursements	Accounts Receivable	Approvals
Automated Disbursements	Budget Execution	Automated Disbursements	Batch Setup
Budget Execution	Document	Budget Execution	Configuration
Credit Card	External Reports	Cost Allocation	Reference
Fixed Assets	Fixed Assets	Credit Card	
General Ledger	General Ledger	Date	
General System	General System	Dimensions	
Planning	GPRA	Document	
Project Cost Accounting	Planning	Employee	

## Pegasys User ID Dropdown

Figure 7: User ID Dropdown

The screenshot shows the user ID dropdown menu for 'A allroles148'. The menu is open, displaying a list of options with right-pointing chevrons. The 'Sign Out' option is highlighted in a green bar at the bottom.

- Support
- Inbox
- Settings
- Shortcuts
- Site Map
- Account Maintenance
- About
- Add Start Page
- User Extension Configuration
- Sign Out



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## User ID Menu Options:

- Support
  - Allows users to access Pegasys online help topics.
- Inbox
  - Returns users to their inbox (starting page). Here users can find their workflow tasks as well as completed tasks.
- Settings
  - Allows users to customize the look of Pegasys by setting styles, bookmarks, user defaults and advanced options.
- Shortcuts
  - Allows users to customize direct access to forms and documents.
- Site Map
  - Provides an alternative way to view menus and their contents.
- About
  - Displays technical and legal information about the version of Pegasys.
- Sign Out
  - Allows users to exit Pegasys.

**NOTE:** Use the Sign Out button before closing the browser in order to close Pegasys properly. Selecting the “x” button first might cause an error when returning to Pegasys.

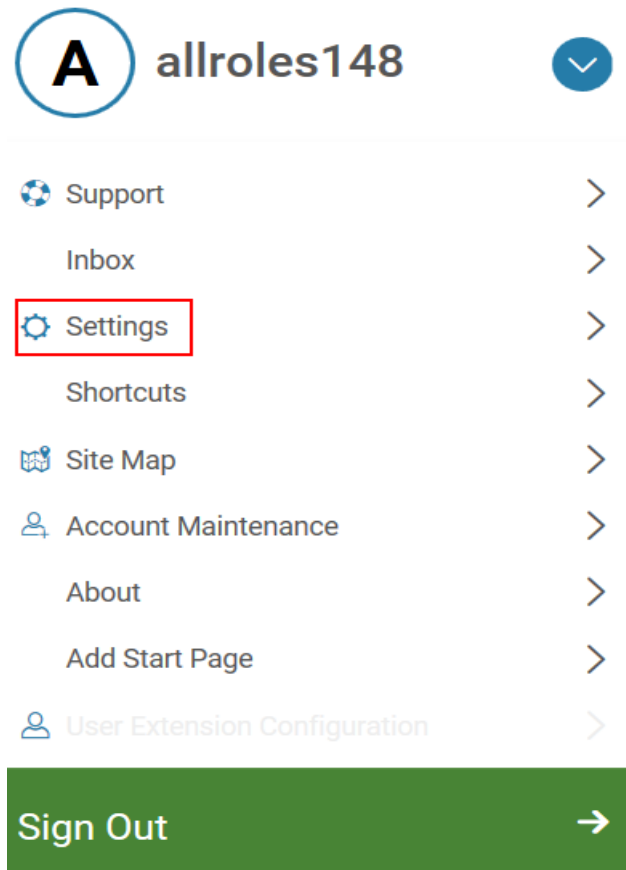
## User Preferences

To access user preferences, select the **Settings** hyperlink in the User ID Dropdown.



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Figure 8: Settings within User ID Dropdown



## User Preferences Menu:

- Settings
  - Allows users to choose the look and feel of Pegasys based on preset themes.
- Bookmarks
  - Allows users to organize bookmarks.
- Advanced Options
  - Allows users to specify a limit on the number of results returned when a search is performed.
- Usability Settings
  - Allows users to change their options for automatic tabbing, expanded sections, and an alternate start page.
- Document Defaults
  - Allows users to set defaults for Vendor, Accounting Template and Currency to be used when forms are created.
- Office Defaults



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- o Allows users to set default for office addresses.
- Workflow Options
  - o Allows users to view their workflow Options.
- Availability
  - o Allows users to change their availability status. When a user’s availability status is set to unavailable, their tasks will be routed to users designated as alternate assignees. See chapter 1 of Purchasing or Finance User Guides.

## Inbox

How to open a workflow task listed in the Inbox.

1. When you log into Pegasys, you might have **Approve Form, Correct Form** or **Ad-Hoc Routing Task** records in your inbox.
2. Highlight the workflow task record you wish to view, and select the **Open and Acquire** button.

Figure 9: Inbox

The screenshot shows the Pegasys 'Inbox' interface. At the top, there is a search bar labeled 'Search Forms And Documents' and a user profile icon for 'allroles148'. Below the search bar, there are tabs for 'Links' and 'Inbox', with 'Inbox' being the active tab. On the left side, there is a search filter panel with the following sections:

- Task:** A dropdown menu.
- Item:** A text input field.
- Task Status:** A dropdown menu.
- Task Description:** A text input field.
- Date Due:** A date range selector.

At the bottom of the filter panel are buttons for 'Search', 'Clear', and 'Refresh', along with a link for 'Additional Criteria'. The main area of the inbox displays a grid of 12 task cards, each representing an 'Approve Form' task. Each card includes the task title, a unique ID, the status (Assigned), and the due date. A red progress bar is visible at the bottom of each card.

Task Title	ID	Status	Due Date
Approve Form	ADS ADS2017031500015	Assigned	Due 04/22/2017
Approve Form	R7RWAIP AMI AMIW0016995-001	Assigned	Due 02/09/2017
Approve Form	R6FIT1 IM6 IM6201606060029	Assigned	Due 06/07/2016
Approve Form	FNL FNL2018010800009	Assigned	Due 01/10/2018
Approve Form	MMR MMR2016120200633	Assigned	Due 12/03/2016
Approve Form	EXTSERVICE QMF QMFESI00281-001	Assigned	Due 04/20/2016
Approve Form	R6GRP3 IM6 IM6201412020003	Assigned	Due 12/02/2014
Approve Form	MNBL IMN IMN7N000031 001	Assigned	Due 03/04/2016
Approve Form	R6GRPS W06 W06201702230000	Assigned	Due 02/24/2017
Approve Form	EXTSERVICE QMN QMNESN00480-001	Assigned	Due 02/24/2016
Approve Form	R7WA109 AMN AMNX0061875-001	Assigned	Due 04/11/2017
Approve Form	MML MML2017082100001	Assigned	Due 08/23/2017





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Figure 10: Inbox Item Details

## APPROVE FORM FNL FNL2018010800008



<b>Task</b>			
Type	Approve Form	Item	FNL FNL2018010800008
Task Description	Approve PENCANCELAPPROVAL FNL FNL2018010800008 Form	Assignment Date	01/09/2018
		Expected Completion Date	01/10/2018
Priority	Medium	Task Status	Assigned
<b>Document</b>			
Document Type	FNL	Amendment/Modification Number	
Document Number	FNL2018010800008	Document Title	Allowance For Loss01/08/2018
Document Date	01/09/2018	Security Organization	GSA
Document Status	PENCANCELAPPROVAL	Form Creation Status	
Total Transaction Amount	<b>\$0.00</b>	Form Creation Step	
Fund Amount	<b>\$0.00</b>	Accounting Period	
Fund Currency	USD	Vendor Code	
Transaction Currency	USD	Vendor Address Code	
Contract Number		Vendor Name	
Blanket Agreement Number			
Classification			
Document Description	SV Generated or Updated on 01/08/2018		
<b>Header Fields</b>			
Assignment Code		Serverable Service/SCAC Code	
Client Phone Number		Short Contract Number (GWAC) Multiyear	
Contract Number			
Bidder's Last Name/Fund Code/Appropriation			

[Open and Acquire](#)
[View](#)
[Release](#)
...

3. For **Approve Form** and **Correct Form tasks**, the form will appear on the screen.



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Figure 11: Open Form

Pegasys / Transactions / Form/Document Selection / Header: FNL Fleet Allowance for Loss on A/R Non-Federal FNL2018010800008 PENCANCELAPPROVAL FULL FORM

1 - 12 of 12 results

Standard Voucher\Standard Voucher Line 154\Country GS34021 Invalid fax number format. Please use one of the following formats: 111-111-1111, (111) 111-1111, 1111111111, 111 111 1111, (111) 111 1111 (where 1 can be any digit).
Standard Voucher\Standard Voucher Line 155\Country GS34021 Invalid fax number format. Please use one of the following formats: 111-111-1111, (111) 111-1111, 1111111111, 111 111 1111, (111) 111 1111 (where 1 can be any digit).
Standard Voucher\Standard Voucher Line 156\Country GS34021 Invalid fax number format. Please use one of the following formats: 111-111-1111, (111) 111-1111, 1111111111, 111 111 1111, (111) 111 1111 (where 1 can be any digit).

Header Fixed Assets Accounting Lines Approval Routing Memos Summary ...

Expand All Collapse All

General

Document Type	FNL Fleet Allowance for Loss on	Original Document Date	01/08/2018
Status	PENCANCELAPPROVAL	Document Date	01/09/2018
Document Number	FNL2018010800008	Accounting Period	04/2018
Title	Allowance For Loss01/08/2018	Reporting Accounting Period	04/2019
Issued By		Document Classification	
	<input checked="" type="checkbox"/> Automatic Reversal	Security Org	GSA
Reversal Accounting Period	05/2018	<input type="checkbox"/> Suppress Printing	
Reverse After Period			

4. If opening an **Ad-Hoc Routing Task**, then the Notification of Ad Hoc Mailing Router Workflow Task page will be displayed.
5. If the ad-hoc routed item is a form, select **Correct** to open the form in edit mode.
6. The **Ad-Hoc Routing Task** will remain in the Inbox until the assignment is manually completed. Therefore, when finished with the form, select **Complete** on the Notification Ad Hoc Mailing Router Workflow Task page.
7. **Approve Form** and **Correct Form** tasks will be removed automatically from the Inbox after the user has either approved or resubmitted the corrected form.
8. When tasks are completed, they are moved from the Inbox tab to the Completed Tasks tab.