



# Pegasys Quick Reference Guide

## IX/PX Document Types: Intro & Business Rules

- PX is a Memorandum of Understanding (MOU) or Inter-agency Agreement where obligations are incurred to procure goods or services between other federal agencies and GSA.
- IX is an MOU or Intra-agency Agreement where obligations are incurred to procure goods or services between GSA services.
- Commercial vendors should never be used with an MOU. A formal contract should be issued through Comprizon.
- Blue fields are mandatory for Pegasys processes but may not include all fields required by GSA or PBS policy.

## PBS Business Rules

- All MOU forms require a minimum of three approvals: Accounting Classification, Funds Authorization and Manager.
- The Requisitioner role is required to have access to PX and IX documents.
- Any modification to PX/IX documents should be entered directly in Pegasys by the region.

## IX/PX Document Types: Recording an Obligation

1. Select **Transactions** → **Purchasing** → **New** → **Order** from the Pegasys menu bar.
2. Enter **IX** or **PX** in the **Document Type** Field.
  - a. PX - Inter-agency Agreement
  - b. IX - Intra-agency Agreement
3. Select **Generate**.
  - a. Pegasys creates a unique number in the Document Number field.
4. Leave the Security Org and Doc Number Prefix fields blank.
5. Enter the **Pegasys Document Number** (PDN) (the one that was just generated) in the **Title** Field.
6. Select **Finish**.



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Figure 1: New Purchasing Order Page

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Pegasys / Transactions / Purchasing / New / **New Order** 📍

New Order

\* Document Type IX ☆ Intra-agency

Document Number Format Prefix ☆

Security Org ☆

\* Document Number IX021688 **Generate**

Title IX021688

Copy Document  None  
 Copy From  
 Copy Forward

File Choose File No file chosen

[Go to top of page](#)

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[≤ Back](#) **Finish** **Cancel**

- a. The **Header Page** will display.



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**Figure 2: Purchasing Order Header Page**

Pegasys / Transactions / Purchasing / New / Order / Header: IX Intra-agency IX021688 NEW FULL FORM

Header Fixed Assets Office Addresses Credit Cards Header Accounting Lines Itemized Lines ...

Expand All Collapse All

**General**

Document Type	IX Intra-agency	Order Date	
Status	NEW	Accounting Period	
Document Number	IX021688	Reporting Accounting Period	
Title	IX021688	Document Classification	
Ordered By		Security Org	GSA
Agency DUNS Number		<input type="checkbox"/> Suppress Printing	
Agency DUNS+4		<input type="checkbox"/> Fast Pay	
Disbursing Office		<input type="checkbox"/> Invoice Required	
		<input type="checkbox"/> Receipt Required	

Verify Save Submit Schedule Refresh Fund Currency ...

7. Enter the vendor code in the **Vendor** field of the Vendor Info section.
  - a. The Address Name field will populate from the Vendor Code that is selected.

**Figure 3: Vendor Information section**

**Vendor Information**

**Vendor**

\* Vendor 28399J ☆ 28399J ☆

**More**

Address Name SSA, OFFICE OF FINANCE

8. In the **Remit To Address** field, enter the same vendor code that was input in the Vendor field.
9. If appropriate, type a Contract Number in the **Contracts Number** field.



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**Figure 4: Contracts Number field**

— Contracts  
Contracts Number  ☆

10. In the **Description** field, enter a brief description of the supply/services being ordered.
11. Select the **Office Addresses** tab.
12. Select the appropriate Office Type, and select the **Office Address** link.  
**NOTE:** The “Invoice” address is required for MOU documents.

**Figure 5: Office Addresses page**

Header Fixed Assets **Office Addresses** Credit Cards Header Accounting Lines Itemized Lines ...

Office Address

1 - 7 of 7 results ↓ ↕ ↗ ✕ ✕

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

**More** 10 per page Page 1 of 1

13. Enter the appropriate address in the **Code** field.
14. Select the **Update Address** button.
  - a. The address information will populate.



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**Figure 6: Update Address Information**

## Office Address

Item: 1 2 3 4 5 6 7

— General

Office Type: COR

Code: 28399J ☆

AAC/DODAAC: ☆

Standardized Format: Yes

Address Name:

Address Line 1:

15. To return to the Office Addresses page, select the **Office Addresses** link.
  - a. Repeat steps 13-15 as needed.
16. Select the **Header Accounting Lines** tab.
17. Select **Add**.

**Figure 7: Header Accounting Lines Tab**

Header   Fixed Assets   Office Addresses   Credit Cards   **Header Accounting Lines**   Itemized Lines   ...

Header Accounting Line   Tax Lines

No results

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

References...                  10 per page   Page 1 of 1

- a. A new **Header Accounting Line** page will display.



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**Figure 8: Header Accounting Line Page**

Header   Fixed Assets   Office Addresses   Credit Cards   **Header Accounting Lines**   Itemized Lines   ...

Header Accounting Line   Tax Lines

Item 1 of 1  
Expand All   Collapse All

— General

Line Number    Original Accounting Period  ☆

Transaction Type  ☆

Prompt Pay Type  ☆

Related Cost Type  ▾

Source Number

Period of Performance

Start Date  📅

End Date  📅

18. Enter the appropriate value in the **Line Amounts** field.

**Figure 9: Line Amounts Section**

— Line Amounts

	Current Amount
Ordered	<input type="text" value="\$0.00"/>
Applied Credit	<input type="text" value="\$0.00"/>
Withholding Tax	<input type="text" value="\$0.00"/>
Line Amount After Withholding	<input type="text" value="\$0.00"/>
Withholding Tax Allowance	<input type="text" value="\$0.00"/>
Net Total	<input type="text" value="\$0.00"/>

19. Enter the appropriate information, or select the **Template** link located in the Accounting Dimensions box lower on the page.



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**Figure 10: Accounting Dimensions section**

- a. Select the **Default** button to populate the template field if using a template from your favorites.
- b. 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.  
Complete any other required accounting elements that were not populated by the accounting template. (Ex: Function Code, Cost Element, etc.).

20. Populate the Transfer Treasury Symbol information in the **Additional Attributes** section.

**Figure 11: Additional Attributes**

21. Enter descriptive information in the **Description** field lower on the page.
22. Select the **Header Accounting Lines** link to return to the Header Accounting Lines page.

**Figure 12: Header Accounting Lines link**

23. If needed, create new lines by selecting the **Add** button and repeating steps 19-23.



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**NOTE:** Lines can be copied by selecting the appropriate line, selecting the Copy button and then selecting the Header Accounting Line link to open the new line to make needed changes.

Lines can be deleted by selecting the appropriate line and selecting the Remove button.

24. Select the **Approval Routing** tab.

**Figure 13: Approval Routing Tab**

Header Fixed Assets Office Addresses Credit Cards Header Accounting Lines Approval Routing ...

No results ↓ ↻ ✕ ✕

Approver Name Approver Id

Add Routing List Add User Remove 10 per page << < Page 1 of 1 > >>

25. Add the appropriate approvers individually or via a routing list.

26. Select **Save** and then **Verify**.

a. Errors will be displayed. If necessary, correct the errors and select **Verify** again.

27. Select the **Submit** button to submit the order form to standard workflow for approvals.

**Figure 14: Submit Button**

Verify Save **Submit** Schedule Refresh Fund Currency ...