



# Pegasys Quick Reference Guide

## MASS IMPORT

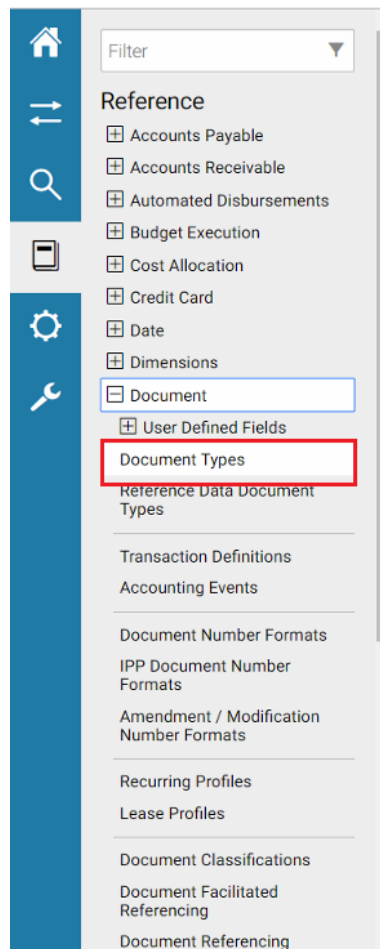
Mass Import is a method by which a user can import and process forms in Pegasys.

Mass Import uses a formatted Excel input file that contains the fields on a Pegasys form that users can populate. The Mass Import Macro can be utilized to populate the Excel input file.

## Processing a Mass Import Template

1. Login to Pegasys and Navigate to Reference > Document > Document Types.

**Figure 1: Navigation to Document Types**



2. Enter the document type in the code field in the search criteria box.
3. Select the document in the item collection.
4. Select [Open].



# Pegasys Quick Reference Guide

Figure 2: Searching for Document Type and Opening

Search Forms And Documents

Pegasys / Reference / Document / Search - Document Type

### Search - Document Type

Search Criteria

Code:

Document Category:

Name:

Short Name:

Subsystem:

Status:

Security Org:

Effective Dates

Start Date:

End Date:

1 - 1 of 1 results

Code	Document Category	Name	Short Name	Subsystem	Status	Start Date
ET	SV - Standard Voucher	On-Line InterFund/InterRegion Cash Transfer (1010.10)	ET	General System	Active	

5. Scroll down to the Import/Export section.
6. Verify the “Eligible for Excel Import” flag is enabled. If so, this document type is eligible for Mass Import.

Figure 3: Verifying Eligibility for Mass Import

Import/Export

Eligible for Excel Import

Eligible for Excel Export

Template Name:

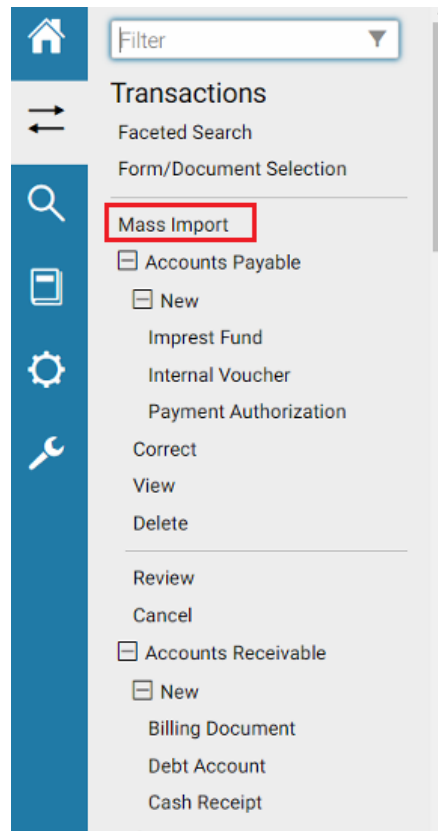
Template Location:

7. Navigate to Transactions > Mass Import.



# Pegasys Quick Reference Guide

Figure 4: Navigation to Mass Import



8. Chose the Document Action that you require.
9. Check the “Hold Rejected Forms” Box to enable it.
10. Check the “Overwrite Rejected” Box to enable it.
11. Check the “Override” Box to enable it.
12. Select [Choose File] in the file section.



# Pegasys Quick Reference Guide

Figure 5: Mass Import Settings

## Mass Import

\* Batch Job ID  ☆

Document Action  ▾

Schedule Date  📅

Hold Rejected Form

Overwrite Rejected

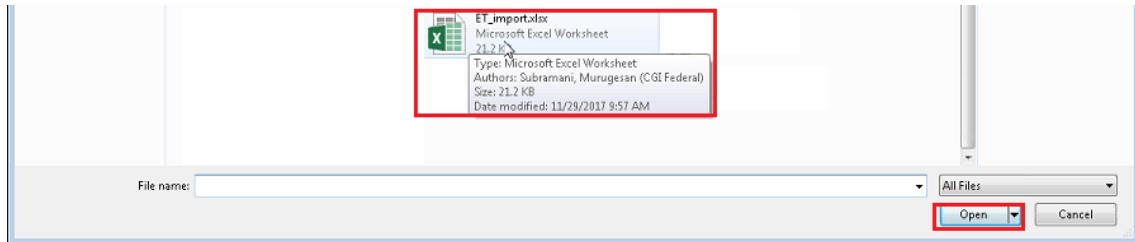
Override

File

[Go to top of page](#)

13. In the File Browser window, select the Template Excel file and Select [Open].

Figure 6: Locating Template and Opening



14. Verify that the Excel file name is populated in the File Box.

Figure 7: Updated File Name

## Mass Import

\* Batch Job ID  ☆

Document Action  ▾

Schedule Date  📅

Hold Rejected Form

Overwrite Rejected

Override

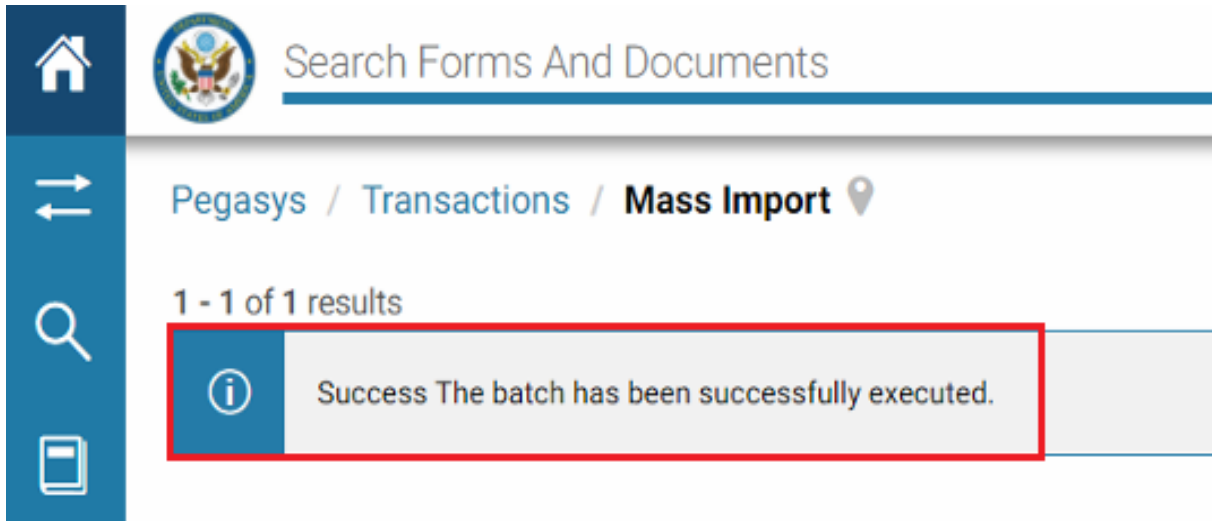
File



# Pegasys Quick Reference Guide

15. Select [Upload].
16. Verify message “Success. The batch has been successfully executed.” gets returned.

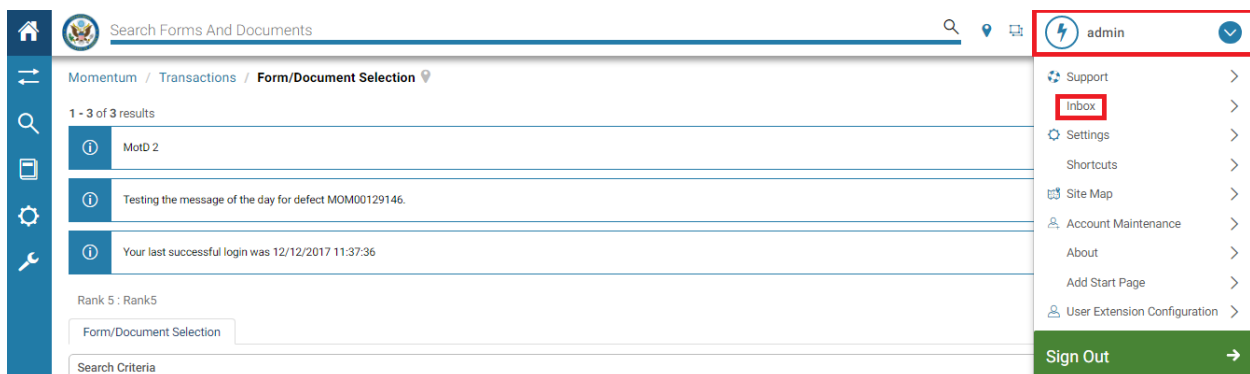
**Figure 8: Upload Success Message**



## Confirming the Batch Job Completion

1. Navigate to Pegasys.
2. Select your User ID and then choose the Inbox link from the dropdown box.

**Figure 9: Inbox Link**



3. Select GSAMASSIMPORT task in the Inbox.



# Pegasys Quick Reference Guide

Figure 10: Inbox Tasks

The screenshot displays the 'Inbox Tasks' interface. The top navigation bar includes a search bar with the text 'Search Forms And Documents' and a user profile 'allroles100'. The left sidebar contains navigation icons and a search filter for 'Item' with the value '\*gsamassimport\*'. The main area shows a grid of task cards, each titled 'Review Offline Processing GSAMASSIMPOR' with an 'Assigned' status and a due date. The top-right card is highlighted with a red border. At the bottom, there is a pagination control showing '1' of 1 items.

4. After selecting the item, verify general completion information and select [View].



# Pegasys Quick Reference Guide

Figure 11: View Button

<b>Task</b>				
Type	Review Offline Processing		Item	GSAMASSIMPORT
Task Description	ItemizedPaymentForm1515533343702.xlsx		Assignment Date	01/09/2018
Expected Completion Date	01/10/2018		Task Status	Completed
Priority	Urgent			
<b>Document</b>				
Document Type		Amendment/Modification		
Document Number		Number		
Document Date		Document Title		
Document Status		Security Organization		
Total Transaction Amount	\$0.00	Form Creation Status		
Fund Amount	\$0.00	Form Creation Step		
Fund Currency		Accounting Period		
Transaction Currency		Vendor Code		
Contract Number		Vendor Address Code		
Blanket Agreement Number		Vendor Name		
Classification				
Document Description				
<b>Header Fields</b>				
Assignment Code		Serverable Service/SCAC		
		Code		
Client Phone Number		Short Contract Number		
		(GWAC)		
Contract Number		Multiyear		
Bidder's Last Name/Fund				
Code/Appropriation				



5. Verify that the Completed field is Success and the Return Status Code is 0 or 8. Select [Attachments].



# Pegasys Quick Reference Guide

Figure 12: Review Status Code

## Review Offline Processing

— Workflow Information

Task	Batch Job
Item	GSAMASSIMPORT
Description	ItemizedPaymentForm151
Submitter	allroles122
Start Time	01/09/2018 16:29:06
End Time	01/09/2018 16:29:06
Completed	Successful
Return Status Code	8

[Go to top of page](#)

**Attachments (2)**

Cancel

Complete

6. In the item collection, select the item and then select [View].

Figure 13: View Attachment

Pegasys A allroles100

1 - 1 of 1 results

<input type="checkbox"/>	Attachment Identifier	Name	Title	Number of Pages
<input type="checkbox"/>	1	GSAMASSIMPORT1508519871965.RPT	GSAMASSIMPORT1508519871965.RPT	

[Return](#) **[View](#)** 10 per page << < | Page 1 of 1 >> >>

[Go to top of page](#)





# Pegasys Quick Reference Guide

7. A new window will open with the batch execution report. Verify the records processed successfully.

**Figure 14: Batch Execution Report Successful Message**

```
1 Information: Batch Job Bulk Load Process started on 10/20/2017 19:17:54.000
2 Information: Entered DocumentAction value: PROCESS
3 Information: Entered UserId value: allrules100
4 Information: Entered createLoadedFile value: T
5 Information: Entered createDeclinedFile value: T
6 Information: Entered holdRejectedForm value: T
7 Information: Entered overwriteRejected value: T
8 Information: Entered overriddenFlag value: T
9 Information: Entered overrideJustification value:
10 Information: Final DocumentAction value: PROCESS
11 Information: Final UserId value: allrules100
12 Information: Final createLoadedFile value: TRUE
13 Information: Final createDeclinedFile value: TRUE
14 Information: Final holdRejectedForm value: TRUE
15 Information: Final overwriteRejected value: TRUE
16 Information: Final overriddenFlag value: TRUE
17 Information: Final overrideJustification value:
18 Information: : B300661 : Begin processing of SV SV20171020023
19 Information: : B305733 : Document ID SV-SV20171020023 was successfully sent to the queue for processing.
20
21
22 Information: : B309682 : Document ID SV-SV20171020023 was processed successfully.
23
24 Information: : B305811 : Number of forms selected to be processed for parameter group 0 : 1
25 Information: : B317721 : Number of forms held for parameter group '0' : '0'
26 Information: : B317761 : Number of forms unable to be held for parameter group '0' : '0'
27 Information: : B317731 : Number of forms scheduled for parameter group '0' : '0'
28 Information: : B317771 : Number of forms unable to be scheduled for parameter group '0' : '0'
29 Information: : B305821 : Number of forms processed successfully for parameter group 0 : 1
30 Information: : B309631 : Number of forms rejected for parameter group 0 : 0
31 Information: : B309671 : Number of forms rejected due to queuing error for parameter group 0 : 0.
32 Information: : B309661 : Number of forms still in process for parameter group 0 : 0.
33 Information: : B309791 : Number of forms submitted for parameter group 0 : 0.
34 Information: : B309691 : Number of forms rejected due to submit error for parameter group 0 : 0
35 Information: : B305881 : Number of submitted forms processed successfully for parameter group 0 : 0
36 Information: : B305891 : Number of submitted forms rejected for parameter group 0 : 0
37 Information: : B301401 : 1/1 import forms read, 0 failed, and 1 successful.
38 Information: : B301321 : Of the 1 forms read (including failed), the breakdown is as follows:
39 Information: : B301411 : Number of processed forms: 0
40 Information: : B301421 : Number of new forms: 1
41 Information: : B301431 : Number of corrected forms: 0
42 Information: : B301441 : Number of cancelled forms: 0
43 Information: : B301451 : Number of amended forms: 0
44 Information: : B301461 : Number of invalid forms: 0
45 Information: : B301471 : Number of submitted forms: 0
46 Information: : B301481 : Number of submit errors forms: 0
47 Information: : B300281 : Number of Parent Records Read : 1
48 Information: : B300281 : Number of Child Records Read : 29
49 Information: : B300281 : Number of Continuation Records Read : 0
50 Information: : B300281 : Number of Error Records Read : 0
51 Information: : B300281 : Number of Total Records Read : 30
52
```