



Pegasys Quick Reference Guide

Routing Forms and Documents

Users can send forms or documents to other Pegasys users for correction or review.

NOTE: Detailed information on routing can be found in the Finance User Guide.

1. Select **Transactions** → **Form/Document Selection** from the Pegasys menu.
2. Search for a previously saved form or processed document by entering the appropriate data in the **Search Criteria** fields.
 - a. OFP (Optimized For Performance) fields are labeled on the Form/Document Selection page. Failure to populate at least one OFP field may result in a search that causes a system timeout and/or overall degraded system performance for all users.
3. Select **Search**.

Figure 1: Form Document Selection

The screenshot shows the 'Form/Document Selection' page in the Pegasys application. At the top, there is a breadcrumb trail: 'Pegasys / Transactions / Form/Document Selection'. Below this is a search bar labeled 'Form/Document Selection'. A note states: 'The fields designated as (OFP) indicate the fields that are Optimized For Performance when executing a search on this page. Failure to populate at least one OFP field may result in a search that causes a system timeout and/or overall degraded system performance for all users.' A smaller note below reads: '*Please enter a To and From Date range of less than one month when searching for documents.*'

The search criteria are organized into several sections:

- Search Criteria:** Includes fields for Subsystem (dropdown), Document Type (OFP), Document Number (OFP), Amendment / Modification Number, Document Category (dropdown), Accounting Period (To/From), From Date (OFP), and System ID (OFP).
- Document Status (OFP):** A grid of checkboxes for status selection: Processed, Canceled, Scheduled, Held, Rejected, Archived, and Pending Approval.
- Vendor:** Includes fields for Code (OFP), DUNS, Designated Agent - ALC, AAC/DODAAC, TIN (SSN/EIN), DUNS+4, and Customer Account (OFP).
- Other Fields:** User ID (OFP), Security Org, and Title/ Contract Number (OFP).

At the bottom left, there are 'Search' and 'Clear' buttons.

4. Select the appropriate record from the generated list.
5. Select **Route**.

NOTE: On a new form, select the Save button. Forms must first be saved successfully before users may route them to others for review.



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Figure 2: Form Document Search Results

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Document Type	Document Number	Amendment / Modification Number	Title	Document Date	Document Status	User ID
<input checked="" type="radio"/> CP	CP2001022800003		Created by Payment Generation	02/28/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010322000010		Created by Payment Generation	05/18/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010406000009		Created by Payment Generation	05/18/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010413000080		Created by Payment Generation	04/13/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010423000068		Created by Payment Generation	04/23/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010508000048		Created by Payment Generation	05/18/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010516000027		Created by Payment Generation	05/29/2001	Processed	pegteamfx11
<input type="radio"/> CP	CP20010517000010		Created by Payment Generation	05/29/2001	Processed	pegteamfx11
<input type="radio"/> CP	CP20010517000021		Created by Payment Generation	05/17/2001	Canceled	pegteamfx2
<input type="radio"/> CP	CP20010518000001		Created by Payment Generation	03/22/2001	Processed	pegteamfx2

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6. Edit the **Subject** and **Description** fields as necessary.

NOTE: Information entered into the Description field will appear in the Inbox Description field.

Figure 3: Main Tab

Main

Mail Stop

General

Subject:

Date Created:

User ID:

Description

Description:

7. Select the **Mail Stop** tab.

8. Select **Add User/Group** to individually select recipients of the routed item.



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Figure 4: Add User Group

No results

ID

[Add User/Group](#)

[Add Routing List](#)

[Delete](#)

[Previous](#)

9. Enter your search criteria in the appropriate fields.
10. Select **Search**.
11. Highlight the record for the recipient of the form or document.
12. Click **Select**.

Figure 5: Search Results Displayed

Search Criteria

Security Principal ID

Name

[Search](#)

[Cancel](#)

1 - 10 of 132 results

ID

Name

<input type="checkbox"/>	allroles275	Linda Tatum All
<input type="checkbox"/>	lindaacoba	Linda Acoba
<input checked="" type="checkbox"/>	lindaarose	Linda A. Rose
<input type="checkbox"/>	lindabair	Linda S. Bair

13. The selected user will be added to the list of recipients on the Mail Stop page.
14. To select multiple recipients saved in a routing list, select **Add Routing List**.



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Figure 6: Add User Group and Routing List



15. Repeat steps 9 - 12 to search for and select a routing list.
16. The users saved in the routing list will be added to the list of recipients on the Mail Stop page.
17. Review the list of recipients, and select **Previous**.

Figure 7: Select Previous Option



- a. The form or document will be sent to the recipients in the order listed on the Mail Stops page.
18. Select **Send**.
- NOTE:** If you route many forms/documents to the same individuals, you can create a routing list for that group by using the Create a New Routing List reference document.