Pegasys Quick Reference Guide

Introduction to Workflow

- All Purchasing Request and Order forms must be approved before they can be processed within Pegasys.
- The form's creator shall add the appropriate approvers on the form's Approval Routing page. All approvers must be added to the form.
- Multiple approvers can be added to the form at once using a routing list. For more information on creating a routing list, please see the Route Forms and Create Custom Routing Lists Quick Reference Guide.
- Upon submission, workflow automatically routes the form for approval to the inbox of the approving officials listed on the form.
- If multiple approvals are required on the form, Workflow routes the form to users in a fixed order determined by the type of approval, set forth by GSA Policy, and not by the order of the approvers listed on the form's Approval Routing page.
- After the final approval is applied, workflow automatically submits and processes the form.
- The form's submitter is the user associated with the processed document in Pegasys.

Adding Individual Approvers to a Form

When approvals are required for a form to process successfully, the proper approving officials must be added on the form's Approval Routing page before submission.

1. On the form, select the **Approval Routing** tab.

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Figure 1: Approval Routing List

2. Select **Add User**.

Figure 2: Add Users

3. Enter the **User ID** or **Name** of the form's approver in the appropriate fields.
4. Select **Search**.
5. Select the record for the approver of the form from the generated list.
6. Click **Select**.

7. The selected user will be added to the list of approvers on the Approval Routing page. Repeat steps 3-7 to add additional approvers to the form.

Adding a List of Approvers to a Form

Multiple approving officials can be added at once to the Approval Routing page on a form by utilizing a routing list.

1. On the form, select the **Approval Routing** tab.
2. Select **Add Routing List**.

Figure 3: Select Add Routing List

3. Enter the **Routing List Code** or **Routing List Name** in the appropriate fields.
   a. If the exact Routing List Code or Routing List Name is unknown, then the asterisk (*****) may be used as a wildcard in the search.

   NOTE: The Code is usually the correspondence symbol.
4. Select **Search**.
5. Select the record for the routing list from the generated list.

Figure 4: Search Code

Search Criteria

* Code `*`
Name [   ]

[Search] [Cancel]

1 - 10 of **540** results

☐	Code	Name
☐	*	yvonnescott
☐	*R11OGC*	Region 11 Counsel's Ofc
☐	001	PR APPROVAL NLGRF
☐	04552761	Purchase Request
☐	05FF-08	5FF08 CERTIFIED INVOICE
☐	08A-GMA-JW	GM&A Acquisition Request-Worthy
☐	1	MyRoutingList
☐	10000D7	D7 routing list

6. Click **Select**.

7. The users saved in the routing list will be added to the list of approvers on the **Approval Routing** page.

8. Repeat steps 3-7 to add additional routing lists to the form.