



# 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**

< Accounting / New / External Direct Agreement / Header: CED FAS Information Technology Cat External Direct Agreement D7M2015112300003 NEW FULL FORM / Approval Routin

Header Office Addresses Header Accounting Lines Supervisors Approval Routing Memos ...

No results

<input type="checkbox"/> Approver Name	Approver Id
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Add Routing List Add User Remove 10 per page Page 1 of 1

Go to top of page

Verify Save Submit Schedule Refresh Fund Currency ...

2. Select **Add User**.

**Figure 2: Add Users**

Header Office Addresses Header Accounting Lines Supervisors Approval Routing Memos ...

1 - 2 of 2 results

<input type="checkbox"/> Approver Name	Approver Id
<input type="checkbox"/> Angela D. Bailey	angeladbailey
<input type="checkbox"/> Angelious Square	angelioussquare

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

Go to top of page

Verify Save Submit Schedule Refresh Fund Currency ...

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**.



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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**

The screenshot shows the Pegasys interface for the 'Approval Routing' tab. The breadcrumb trail at the top reads: </ External Direct Agreement / Header: CED FAS Information Technology Cat External Direct Agreement ADN0063205-001 NEW FULL FORM / Approval Routin. Below the breadcrumb, there are tabs for 'Header', 'Office Addresses', 'Header Accounting Lines', 'Supervisors', 'Approval Routing', and 'Memos'. The 'Approval Routing' tab is active. Below the tabs, there is a search area with the text 'No results' and a search icon. Below the search area, there is a table with two columns: 'Approver Name' and 'Approver Id'. Below the table, there are three buttons: 'Add Routing List', 'Add User', and 'Remove'. Below the buttons, there is a pagination control showing '10 per page' and 'Page 1 of 1'. Below the pagination control, there is a link 'Go to top of page'. At the bottom of the page, there are several buttons: 'Verify', 'Save', 'Submit', 'Schedule', 'Refresh', and 'Fund Currency'.

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.



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Figure 4: Search Code

Search Criteria

\* Code

Name

1 - 10 of 540 results

<input type="checkbox"/> Code	Name
<input type="checkbox"/> *	yvonnescott
<input type="checkbox"/> *R110GC*	Region 11 Counsel's Ofc
<input type="checkbox"/> 001	PR APPROVAL NLGRF
<input type="checkbox"/> 04552761	Purchase Request
<input type="checkbox"/> 05FF-08	5FF08 CERTIFIED INVOICE
<input type="checkbox"/> 08A-GMA-JW	GM&A Acquisition Request-Worthy
<input type="checkbox"/> 1	MyRoutingList
<input type="checkbox"/> 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.