



# 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. IX - Intra-agency Agreement
  - b. PX - Inter-agency Agreement
3. Select **Generate**.
  - a. Pegasys creates a unique number in the **Document Number** field.
  - b. Once the **Document Number** is generated, the **Generate** button will be disabled, prohibiting multiple clicks so that sequence numbers are not skipped.
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

[New Order](#)

\* Document Type

Document Number Format Prefix

Security Org

\* Document Number

Title

Copy Document  None  
 Copy From  
 Copy Forward

File  No file chosen

[Go to top of Main Content](#)

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- 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 IX023735 NEW FULL FORM

### HEADER

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

Expand All Collapse All

**General**

Document Type	IX	Intra-agency	Order Date	
Status	NEW		Accounting Period	
Document Number	IX023735		Reporting Accounting Period	
Title	IX023735		Document Classification	
Ordered By			Security Org	GSA
Agency UEI			<input type="checkbox"/> Suppress Printing	
Agency DUNS Number			<input type="checkbox"/> Fast Pay	
Agency EFT Indicator			<input type="checkbox"/> Invoice Required	
Disbursing Office			<input type="checkbox"/> Receipt Required	

Vendor Information

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.

**Figure 4: Contracts Number Field**

**Contracts**

Contracts Number

10. In the **Description** field, enter a brief description of the supply/services being ordered.



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11. Select the **Office Addresses** tab.
12. Select from an expanded list of Office Types, and select the **Office Address** link.

**NOTE:** The “Invoice” address is required for MOU documents.

**Figure 5: Office Addresses page**

**OFFICE ADDRESSES**

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

Office Address | Additional Contacts

1 - 7 of 7 results

Office Type	Office	Address	Primary Point Of Contact
<input checked="" type="radio"/> Admin		null null	
<input type="radio"/> COR		null null	
<input type="radio"/> Delivery		null null	
<input type="radio"/> Issue		null null	
<input type="radio"/> Invoice		null null	
<input type="radio"/> Order		null null	
<input type="radio"/> Property		null null	

More | **Add** | Copy | Remove

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.

**Figure 6: Update Address Information**

**OFFICE ADDRESS**

Office Address | Additional Contacts

Item 1 of 1

— General

Default Mailing Address | **Update Address** | Clear Address

\* Office Type: COR

Code: 28399J ☆ | 28399J ☆

AAC/DODAAC: ☆

Standardized Format: Yes

Address Name: \_\_\_\_\_

Address Line 1: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

15. Select the Additional Contacts tab to add multiple Contacts.
16. To return to the Office Addresses page, select the **Office Addresses** link.



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- a. Repeat steps 13-15 as needed.
- 17. Select the **Header Accounting Lines** tab.
- 18. Select **Add**.

**Figure 7: Header Accounting Lines Tab**

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

**Figure 8: Header Accounting Line Page**

- 19. Enter the appropriate value in the **Line Amounts** field.



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**Figure 9: Line Amounts Section**

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

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

**Figure 10: Accounting Dimensions section**

— Accounting Dimensions

\* Template  ☆

Default

* BBFY <input type="text"/> >	EBFY <input type="text"/> >	Fund <input type="text"/> ☆	Region <input type="text"/> ☆	Org Code <input type="text"/> ☆	Program <input type="text"/> ☆
Project Code <input type="text"/> ☆	Activity <input type="text"/> ☆	Sub-Object Class <input type="text"/> ☆	Building # <input type="text"/> ☆	Location/System <input type="text"/> ☆	Vehicle Tag # <input type="text"/> ☆
Work Item <input type="text"/> ☆	Lease # <input type="text"/> ☆	Cost Organization <input type="text"/> ☆	YBA <input type="text"/> >	BETC <input type="text"/> ☆	Cohort Yr <input type="text"/> >
PRC <input type="text"/> ☆					

- Select the **Default** button to populate the template field if using a template from your favorites.
- 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.).

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



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**Figure 11: Additional Attributes**

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

**Figure 12: Header Accounting Lines Link**

## HEADER ACCOUNTING LINES

- 24. If needed, create new lines by selecting the **Add** button and repeating steps 19-23.  
**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.
- 25. Select the **Approval Routing** tab.

**Figure 13: Approval Routing Tab**

- 26. Add the appropriate approvers individually or via a routing list.
- 27. Select **Save** and then **Verify**.
  - a. Errors will be displayed. If necessary, correct the errors and select **Verify** again.
- 28. Select the **Submit** button to submit the order form to standard workflow for approvals.
  - a. The user can select the **Submit/Urgent** split button, to set a Workflow Priority of Urgent when submitting the form for approval.



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Figure 14: Submit Button

