



# Pegasys Quick Reference Guide

## PJ/PN Document Types: Introduction and Business Rules

- Orders are created in Comprizon when a decision is made to purchase goods or services from a vendor.
- Once awarded, the Purchase order form (i.e., GSA Form 300 or SF-1442) from Comprizon is used to record an obligation in Pegasys. Orders may later be associated to receipts, invoices and payments. A Purchase Request (Pegasys document type PR) can precede an order. (For PBS documents, requisitions/PRs are created and processed in Comprizon.)
- Blue fields are mandatory for Pegasys processes, but may not include all fields required by GSA or PBS policy.

## PBS Business Rules

- Any modifications to PJ or PN documents should be entered directly in Pegasys by the region. Continue to send paper modifications to Finance on existing IB (non-recurring service) documents.
- Purchase orders must be signed by the contracting officer prior to obligating funds in Pegasys. No approvals are required for PJs or PNs in Pegasys.
- The PBSCONTR role is required to have access to PJ and PN documents.
- Receiving Reports should be processed directly in Pegasys for all contracts created in Pegasys.

## PJ/PN Document Types: Recording an Obligation

1. Select **Transactions** → **Purchasing** → **New** → **Order** from the Pegasys menu bar.
2. Enter **PJ** or **PN** in the **Document Type** Field.
  - a. PJ: PBS 3-Way Obligation (Generally awarded on GSA Form 300)
  - b. PN: Construction (Comprizon Order awarded on a SF - Form 1442)
3. Enter the complete PJ or PN number generated by Comprizon in the **Document Number** field.
4. The Security Org field will default with the user's Security Org.
5. Select **Finish**.



# Pegasys Quick Reference Guide

Figure 1: New Purchasing Order Page

[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

[Go to top of Main Content](#)

---

6. Enter the **Pegasys Document Number** (PDN) in the **Title** Field.
  - a. Order Date, Accounting Period and Reporting Accounting Period fields will default to the current date, when the form is Verified or Processed.
  - b. Leave the **Document Classification** field blank.



# Pegasys Quick Reference Guide

**Figure 2: Purchasing Order Header Page**

Pegasys / Transactions / Purchasing / New / Order / Header: PN PBS Construction Obligation PN202103021 NEW FULL FORM

### HEADER

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

Expand All | Collapse All

— General

Document Type	PN	PBS Construction Obligation	Order Date	<input type="text"/>
Status	NEW		Accounting Period	<input type="text"/>
Document Number	PN202103021		Reporting Accounting Period	<input type="text"/>
Title	PN202103021		Document Classification	<input type="text"/>
Ordered By	<input type="text"/>		Security Org	GSA
Agency UEI	<input type="text"/>		<input type="checkbox"/> Suppress Printing	
Agency DUNS Number	<input type="text"/>		<input type="checkbox"/> Fast Pay	
Agency EFT Indicator	<input type="text"/>		<input type="checkbox"/> Invoice Required	
Disbursing Office	<input type="text"/>		<input type="checkbox"/> Receipt Required	

+ Vendor Information

Verify | Save | Submit | Schedule | Refresh | Fund Currency | ...

7. Enter the vendor code, or select **Vendor** in the Vendor Info group box to search for a vendor.

**Figure 3: Vendor Information section**

— Vendor Information

Vendor

\* Vendor  ☆  ☆

Address Name

a. Enter applicable search criteria, and select **Search**.



# Pegasys Quick Reference Guide

Figure 4: Vendor Search Criteria

**Search Criteria**

Code	<input type="text"/>
UEI	<input type="text"/>
DUNS Number	<input type="text"/>
EFT Indicator	<input type="text"/>
CAGE Code	<input type="text"/>
AAC/DODAAC	<input type="text"/> ☆
Name	<input type="text"/>
Legal Name	<input type="text"/>
Taxpayer Name	<input type="text"/>
TIN	<input type="text"/>
Vendor Category	<input type="text"/> ☆
Vendor Class	<input type="text"/> ☆
Vendor Group	<input type="text"/> ☆
Vendor Type	<input type="text"/> ☆
Default Payment Type	<input type="text"/> ☆
Reporting Attribute	<input type="text"/> ▼
Currency Code	<input type="text"/> ☆



# Pegasys Quick Reference Guide

8. Find the vendor, and select **Select**.

**Figure 5: Vendor Select**

		Vendor Codes	Address Code
<input type="button" value="Select"/>	★	28399J	28399J

- a. The Vendor Name field will populate from the Vendor Code that is selected.
9. In the **Remit To Address** field, enter the same vendor code that was input in the Vendor field (Ex: If “00008” was selected in the Vendor address code field, enter “00008” in the Remit to Address field).

**NOTE:** It is important that the Remit to Address matches the address that will be on the vendor invoice.

**Figure 6: Customer Account and Remit To Address**

---

Customer Account

\* Remit To Address

10. Enter a Contract Number in the **Contracts Number** field, and, if applicable, a Delivery Order Number in the **Delivery Order Number** field.



# Pegasys Quick Reference Guide

**Figure 7: Contracts Section**

— Contracts

Contracts Number  ☆

Blanket Agreement Number  ☆

Delivery Order Number  ☆

11. Enter a brief description of the supply/services being ordered in the **Description** field.
12. Select the **Office Addresses** tab.
13. Select the appropriate **Office Type**.
14. Select the **Office Address** hyperlink.

**Figure 8: 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 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 checked="" type="radio"/> Property		null null	

More **Add** Copy Remove 10 per page << Page 1 of 1 >>

- a. The specific Office Address will display.
15. Enter the appropriate address in the **Code** field.
16. Select the **Update Address** button to populate the fields in the Address Information section.



# Pegasys Quick Reference Guide

**Figure 9: Update Address Information**

**OFFICE ADDRESS**

Office Address | Additional Contacts

Item 2 of 7: 1 2 3 4 5 6 7

**— General**

Default Mailing Address | Update Address | Clear Address

\* Office Type: COR

Code: [ ] [ ]

AAC/DODAAC: [ ]

Standardized Format: Yes

Address Name: [ ]

Address Line 1: [ ]

17. Select from an expanded list of Office Types.
18. Select the Additional Contacts tab to add multiple Contacts.
19. Select the **Office Addresses** link to return. Repeat steps 13-16 as needed.
20. Select the **Header Accounting Lines** tab.
21. Select **Add**.

**Figure 10: Header Accounting Lines Tab**

**HEADER ACCOUNTING LINES**

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

Header Accounting Line | Tax Lines

No results

Line Number	Amount	Transaction Type	Accounting Template	BBFY	EBFY	Fund	Reg	Org Cd	Prgm	Proj Cd	Acty	SOC
Total Header Funded Amou												

References... | Add | Copy | Remove | Reset | Replace | 10 per page | Page 1 of 1

22. For **PN documents**, enter CONSTR14 in the **Prompt Pay Type** field (General section). For all other document types, leave the Prompt Pay Type field blank.



# Pegasys Quick Reference Guide

Figure 11: Prompt Pay Type

— General

Line Number	<input type="text" value="1"/>
Transaction Type	<input type="text" value="☆"/>
Prompt Pay Type	<input type="text" value="☆"/>
Related Cost Type	<input type="text" value="N/A"/> ▾

23. Enter the appropriate value in the **Line Amounts** field.

Figure 12: Line Amounts Section

— Line Amounts

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

24. Enter the template (if known), or select the **Template** link located in the Accounting Dimensions box (lower on the page).

Figure 13: Accounting Dimensions Section

— Accounting Dimensions

\* Template  ☆

Default

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





# Pegasys Quick Reference Guide

25. Enter the applicable search criteria.

26. Select **Search**.

**Figure 14: Accounting Template Search Criteria**

Search Criteria

Name

Security Org  ☆

Effective Dates

Start Date  🗓

End Date  🗓

27. Find the appropriate template record, and select the corresponding **Select** button.

a. The selected template will populate in the **Template** field.

**Figure 15: Select Accounting Template**

1 - 1 of 1 results

	Name	BBFY	EBFY	Fund	Reg	Org Cd	Sub Org	Prgm	Proj Cd	Sub Proj	Acty	SOC
<input type="button" value="Select"/> ★	NV-14C479186	2021		285X	09	Q09MDBA0		TM10			AF247	L52

28. Select the **Default** button to populate the template field if you are manually typing in the template or using a template from your favorites.

**Figure 16: Accounting Dimensions Default Button**

— Accounting Dimensions

★ Template  ☆

29. Complete any other required accounting elements that were not populated by the accounting template (Ex: Function Code, Cost Element, etc.).

30. Enter an **RWA number** or Agreement Number in the Agreement group box, if applicable.

- Enter the numeric portion of the Agreement Number in the Agreement Number field.
- Verify which Agreement Line must be charged, and enter that number in the Agreement Line Number field.

**Figure 17: Agreement Section**

— Agreement

Agreement Number  ☆

Agreement Line Number  ☆

31. Enter descriptive information in the **Description** field further down the page.



## Pegasys Quick Reference Guide

32. Select the **Header Accounting Lines** link to return to the Header Accounting Lines page.
33. If needed, create new lines by selecting the **Add** button and repeating steps 20-29.  
**NOTE:** Lines can be copied by selecting the appropriate line, selecting the Copy button and then selecting the Header Accounting Line hyperlink to open the new line to make needed changes. Lines can be deleted by selecting the appropriate line and selecting the Remove button.
34. Select **Save** and then **Verify**.
  - a. Any errors will be displayed. If necessary, correct the errors and select Verify again.
35. Select the **Submit** button to submit the order form.
  - a. The user can select the Submit/Urgent split button, to set a Workflow Priority of Urgent when submitting the form for approval.

**Figure 18: Submit Button**

