



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

4. Select the appropriate record from the generated list.
5. Select the ellipsis (...) then **Route > Ad-hoc**.

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

1 - 10 of 59 results

| Document Type | Document Number | Amendment / Modification Number | Temporary Amendment Number | Title | Document Date | Document Status | User ID |
|-------------------------------------|-----------------|---------------------------------|----------------------------|-------------------------------------------|---------------|-----------------|------------|
| <input checked="" type="radio"/> CP | CP2020113000000 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000001 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000002 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000003 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000004 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000005 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000006 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000007 | | | Re-Reconciled Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000008 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |
| <input type="radio"/> CP | CP2020113000009 | | | Transfer - Credit Card Payment Process | 11/30/2020 | Rejected | allroles90 |

Correct Cancel Delete View Reference Query Amend/Modify ... 10 per page << Page 1 of 6 >>

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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: CP CP2020113000000

Date Created: 12/03/2020 21:33:25

User ID: allroles155

Description

Description:

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

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



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Figure 4: Add User Group

No results

ID

9. Enter your search criteria in the appropriate fields.
10. Select **Search**.
11. Highlight the record for the user or Workflow Group of the form or document.
12. Select the **Select** button.

Figure 5: Search Results Displayed

Search Criteria

User/Group ID

Name

1 - 10 of 166 results

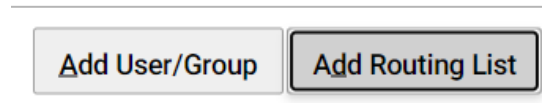
| <input type="checkbox"/> ID | Name |
|-------------------------------------------------|--------------------------|
| <input type="checkbox"/> MelindaAJohnson | Melinda A. Johnson |
| <input checked="" type="checkbox"/> allroles275 | Linda Tatum All |
| <input type="checkbox"/> belindaarthur | Belinda Arthur - Removed |
| <input type="checkbox"/> belindabriseno | Belinda Briseno |

13. The selected user or Workflow Group 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**.



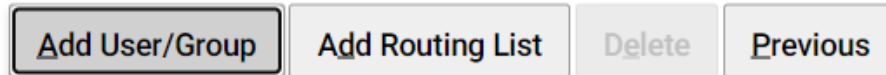
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Figure 6: Add User Group and Routing List



15. Repeat steps 8 - 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.