



Pegasys Quick Reference Guide

Attaching a Document: Intro

Pegasys allows users to add attachments to most forms, documents, and various queries and notebooks. The attachment may be in a variety of formats such as a Word document, PDF or Excel spreadsheet. Once the file is attached to a form, document, query record, or notebook, it can be viewed in Pegasys by users **with the proper credentials**.

- The following queries and notebooks also permit attachments:
 - o Agreement Query
 - o Project Notebook/Query
 - o Initiative Notebook/Query
 - o Planning Notebook/Query
 - o Credit Card Reconciliation Notebook
 - o Credit Card Log
 - o Document Level Reorganization Notebook
 - o Global Level Reorganization Notebook
 - o Blanket Agreement Query
 - o Contract Query
 - o Debt Account Query

NOTE: Adding an attachment to an already processed document does not require the document to go through the approval process again.

Attaching a Document

1. Open an existing form or document and select the **Attachments** button.

Figure 1: Attachments Button

The screenshot shows a 'General' form with the following fields and values:

Document Type	2C	VITAP-FTS Receiving Repc
Status	REJECTED	
Document Number	2C2021G78U426SIT2	
Title	G78U-426 SIT	
Received By	na	
Invoice #		
Invoice Date		
Disbursing Office	KC6	
	<input type="checkbox"/> Automatic Reversal	
Reversal Accounting Period		
Reverse After Period		
Agency UEI		
Agency DUNS Number		

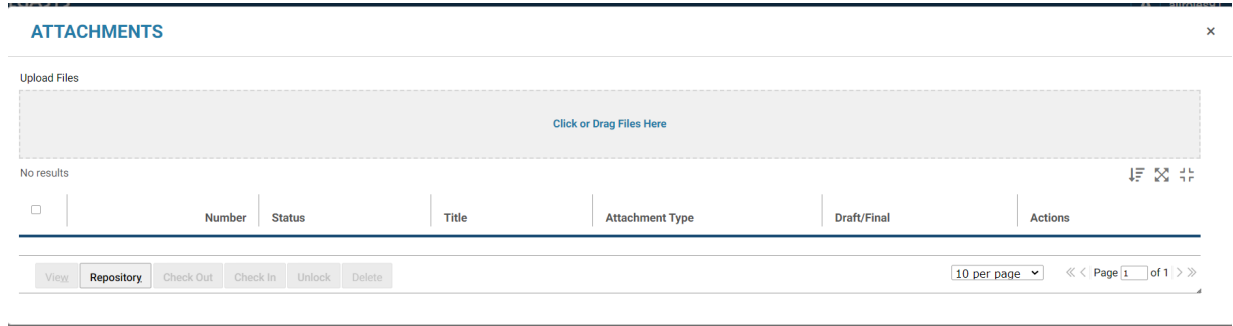
At the bottom of the form, there is a navigation bar with buttons: Fund Currency, Add Shortcut, Attachments (highlighted with a red box), Route, and Generate Template Report.



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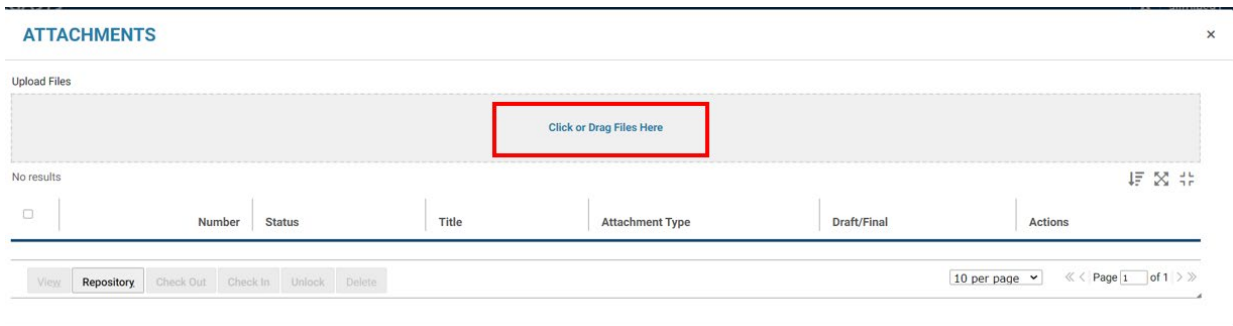
2. The Attachments screen is displayed.

Figure 2: Attachments Screen



3. Drag attachment to the **Upload Files** area or select the link located in the Upload Files area.

Figure 3: Link in the Upload Files Area

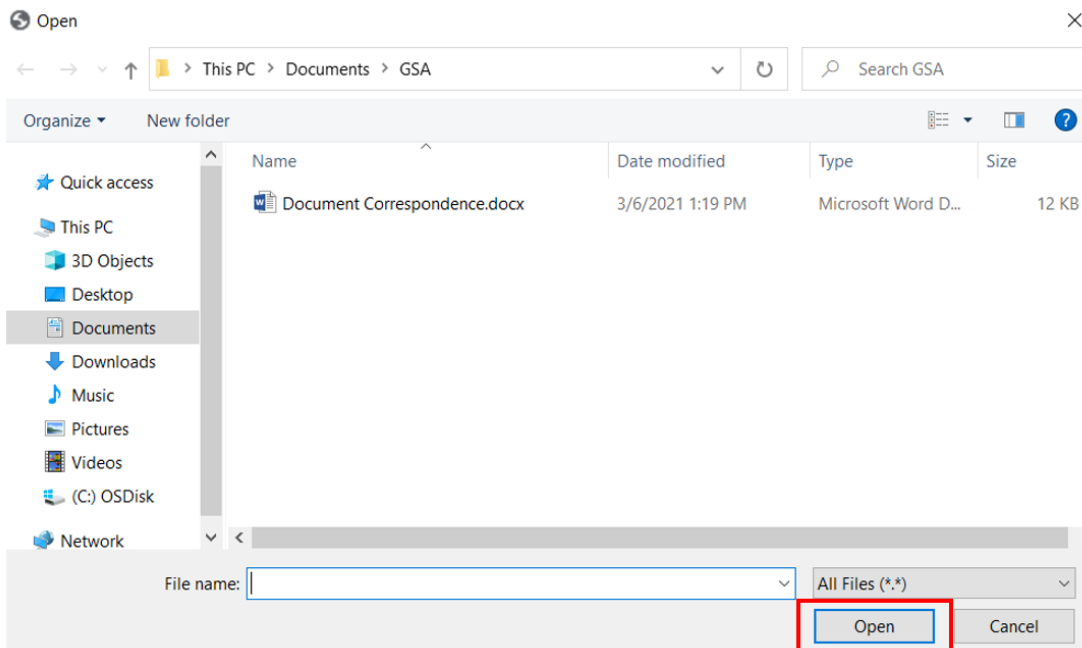


NOTE: If the link is selected, the Windows Explorer page will display as shown in **Figure 4**.



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Figure 4: Windows Explorer



4. Select the file for upload and select the Open button.

Figure 5: Populated Attachments Screen

DOCUMENT ATTACHMENTS

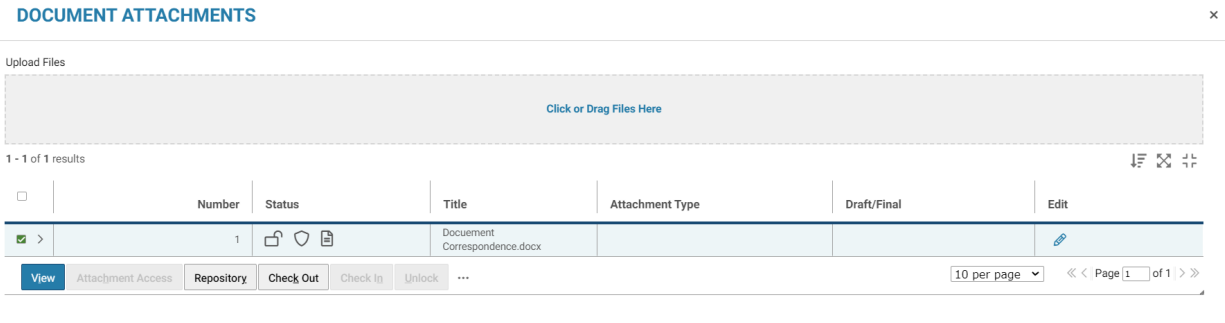
Number	<input type="text" value="1"/>
Title	<input type="text" value="Document Correspondence"/>
Number of Pages	<input type="text"/>
Attachment Date	<input type="text" value="05/07/2021"/>
Attachment Type	<input type="text"/>
Draft/Final	<input type="text" value=""/>
File Name	<input type="text" value="Document Correspondence"/>
Type	<input type="text" value="docx"/>

5. Select the **Apply** button to add the attachment.



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Figure 6: Attachments Screen with Attachment



6. Select the **X** in the upper right corner to close the window. The attachment is added to the document.

Figure 7: Attachment Added to Document

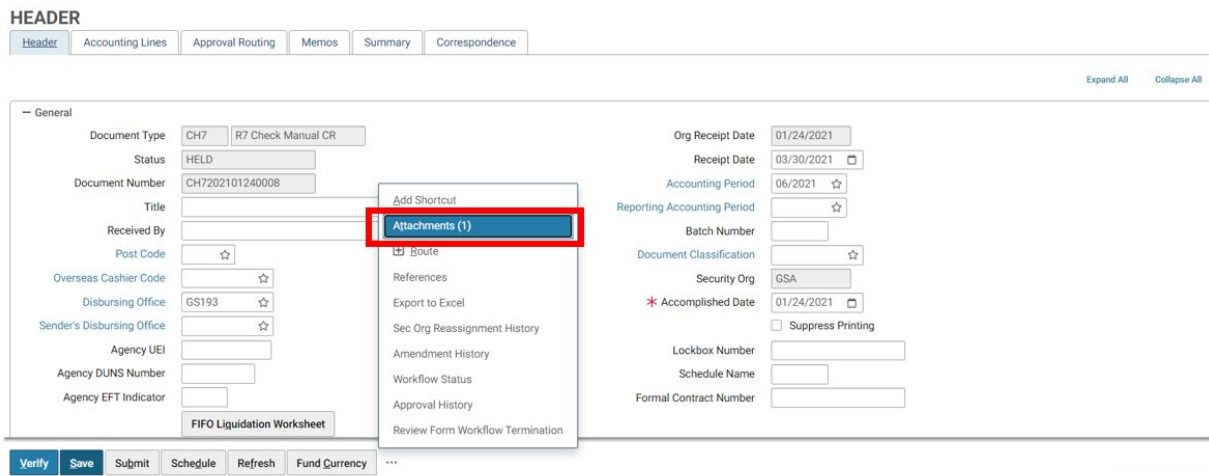


NOTE: If you receive an error stating “An error occurred while adding an attachment from the repository,” visit the **Removing Orphaned Attachments** section.

Attaching a Document: Limiting Access

1. Open an existing form or document and select the **Attachments** button by selecting the ellipsis.

Figure 8: Attachments Button

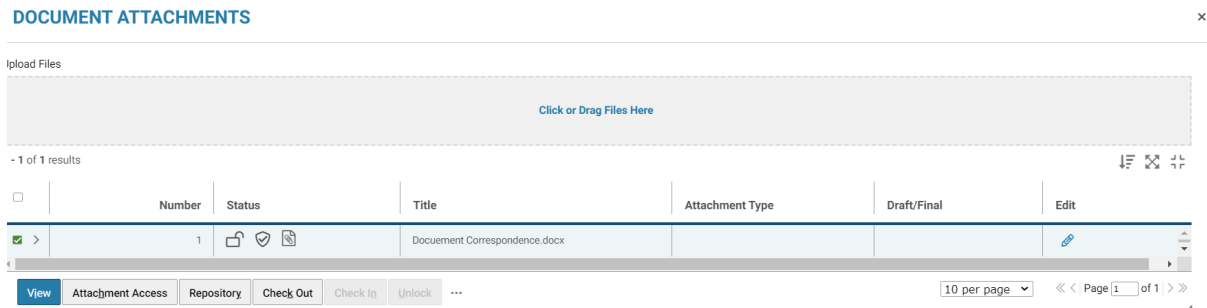


2. The Attachments screen is displayed.



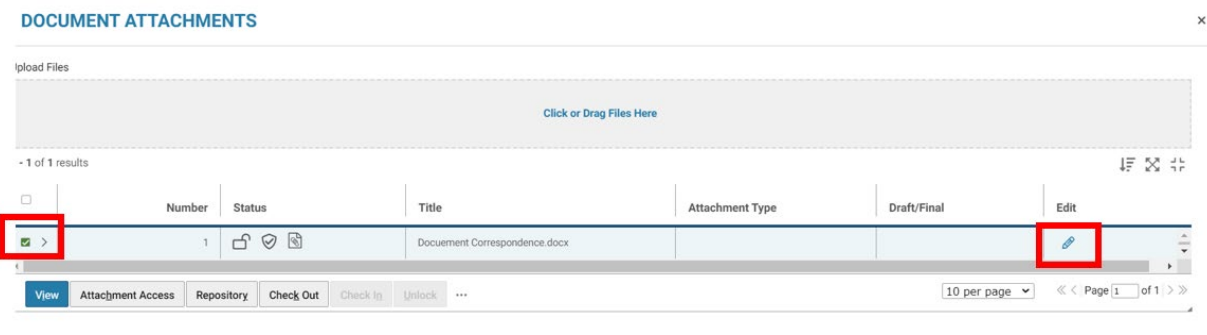
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Figure 9: Attachments Screen Displayed



3. Select the attachment and then the Edit icon

Figure 10: Edit Icon



4. Check the **Sensitive** checkbox if you want to limit the document to only designated users and select **Apply**.
 - a. The user uploading the document is automatically granted Attachment Manager Permissions on the specific attachment and also receives the ability to view, edit and delete the file and grant access for the attached file to other users. The security settings are unrelated to other budget roles in Pegasys.



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Figure 11: Sensitive Flag

DOCUMENT ATTACHMENTS

Number:
Title:
Number of Pages:
Attachment Date:
Attachment Type:
Draft/Final:
File Name:
Type:

Attachment
 Attachment Editable Flag
 Sensitive
 Signed

Description:

5. Select the document, and select the **Attachment Access** button to open the **Attachment Managers** screen.

Figure 12: Attachment Access

DOCUMENT ATTACHMENTS

Upload Files
Click or Drag Files Here

1 - 1 of 1 results

	Number	Status	Title	Attachment Type	Draft/Final	Edit
<input checked="" type="checkbox"/>	1		Document Correspondence.docx			

...

10 per page << Page 1 of 1 >>

Figure 13: Attachment Managers Screen

ATTACHMENT MANAGERS

[Attachment Managers](#) External Attachment Access

1 - 1 of 1 results

User ID

<input type="radio"/>	allroles91
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* Supervisor

View
 Edit
 Delete



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6. Select **Add** to add a user with attachment access. Enter or search for a **Supervisor** or **Name**.

Figure 14: Search for User

User ID

○ allroles91

Add Copy Remove

* Supervisor

Supervisor	Name
ALLROLES_ACCTS_REC	All Roles CGI ACCTS_REC
ALLROLES_AUTO_MATCH	All Roles CGI AUTO_MATCH
ALLROLES_BUDGET	All Roles CGI BUDGET
ALLROLES_COST_ALLOC	All Roles CGI COST_ALLOC
ALLROLES_DESKTOP1	All Roles CGI DESKTOP1
ALLROLES_DESKTOP2	All Roles CGI DESKTOP2
ALLROLES_FIXED_ASSETS	All Roles CGI FIXED_ASSETS
ALLROLES_GL	All Roles CGI GL
ALLROLES_NOVATIONS	All Roles CGI NOVATIONS
ALLROLES_PLANNING	All Roles CGI PLANNING

Back

7. Check **View**, **Edit** and /or **Delete** checkboxes based on what type of access you want the user to have.

Figure 15: Type of Access

User ID

○ allroles91

● ALLROLES_BUDGET

Add **Copy** Remove

* Supervisor ALLROLES_BUDGET

View

Edit

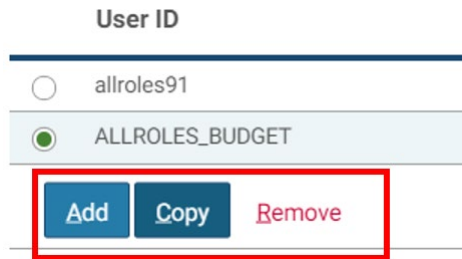
Delete

8. Select the **Back** button to return to the Attachment screen.
 - a. Select the **Copy** button to copy the permissions for another user.
 - b. Select the **Remove** button to remove a user.



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Figure 16: Copy and Remove Buttons



9. Select the **X** in the upper right corner to close the Attachments screen and return to the document.

NOTE: If you receive an error stating “An error occurred while adding an attachment from the repository,” visit the **Removing Orphaned Attachments** section.

Removing Orphaned Attachments

When an attachment is uploaded to a form and the form is closed prior to saving, the attachment file(s) are created in the attachment repository and are not linked to any active document. This is referred to as an “Orphaned Attachment”. Typically, the system will issue an error when a user attempts to upload the same attachment in a new form, preventing the same attachment name from being uploaded.

The process of removing an Orphaned Attachment is having the Batch Job GSATCHRMVL submitted by the Designated Batch Job Runner. This streamlines the process for removing unreferenced attachments. Rather than manually deleting individual unreferenced attachments, the GSATCHRMVL batch process can purge them on a regular basis.

The batch job GSATCHRMVL can be run in two modes:

- In Preliminary Mode (P). Orphaned Attachments are saved to a predetermined file location and can be reviewed by the user before the attachment is purged.
- In Final Mode (F). Orphaned Attachments are purged.