



Pegasys Quick Reference Guide

Getting Started with Pegasys

Pegasys is compatible with Internet Explorer, Microsoft Edge; Mozilla Firefox 4 and higher; and Google Chrome.

Signing In

1. Open one of the web browsers compatible with Pegasys and navigate to <https://corporateapps.gsa.gov/applications/financial-apps/pegasys/>.
2. Select the **Login** link under **Getting Started**.

Figure 1: Login Page

User ID

Password

[Forgot Password](#)

NOTE: If Pegasys finds an existing session for your User ID, a notification will appear. To close the existing session, select the **Continue** button. The previous session will close, and you will be signed in.

Figure 2: Concurrent Sessions

PEGASYS A allroles162

SYSTEM MESSAGES
1 - 1 of 1 results

ⓘ Your last successful login was 03/29/2021 13:26:03

THE MAXIMUM NUMBER OF SESSIONS HAS BEEN REACHED FOR YOUR USER ID

The maximum number of sessions has been reached for the current user id. Click 'Continue' to end an existing session and continue logging in, or 'Cancel' to return to the login page.

Continue Cancel

3. Enter your Pegasys User ID in the User ID field (all lowercase).
NOTE: GSA users will be logged in via Single Sign On.
4. Enter your Pegasys password in the Password field (case sensitive and without spaces).
5. Select the **Sign In** button.

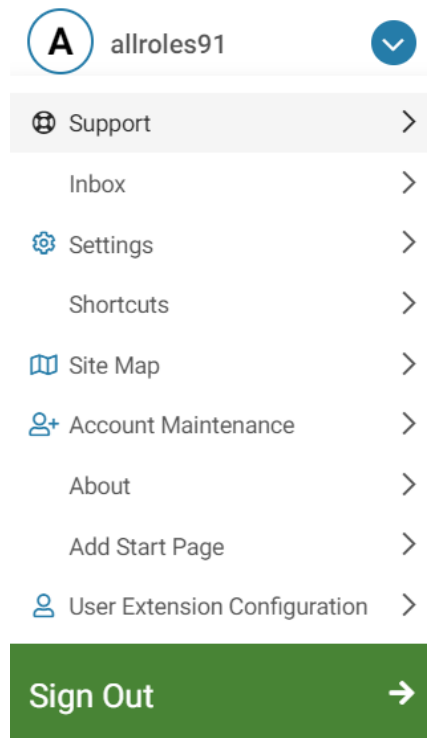


Pegasys Quick Reference Guide

Signing Out

1. In the User ID Dropdown, select the **Sign Out** hyperlink.

Figure 3: User ID Dropdown



NOTE: Use the Sign Out button before closing the browser in order to close Pegasys properly. Selecting the “x” button first might cause an error when returning to Pegasys.



Pegasys Quick Reference Guide

Menu Bar

The Pegasys Subsystems are organized within the menu bar, which consists of six buttons. These are home, transactions, queries, references, system administration, and utilities. These can be found on the left side of the page or on the top of the page.

NOTE: If a user is a Manager that will perform recertifications, the Menu Bar also will include a Recertification icon.

Figure 4: Menu Bar



NOTE: The display of the menu bar can be changed by navigating to the User ID Dropdown and then selecting Settings. Within the settings page is a Side Navigation flag which when enabled, will display the menu bar vertically along the left side of Pegasys. If this flag is marked false, the menu will appear horizontally at the top of Pegasys.

Figure 5: Change Menu Bar Display

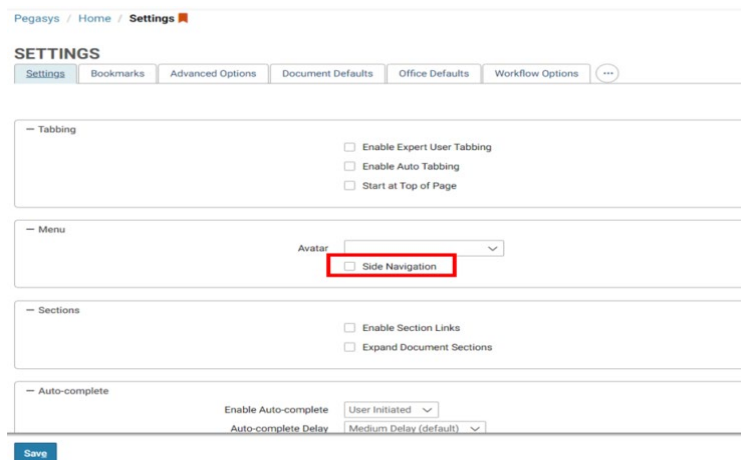


Figure 6: Horizontal Menu Bar



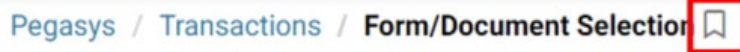


Pegasys Quick Reference Guide

Menu Bar Options:

- **Transactions**
 - o Allows users to create, amend, correct, view, delete, review and cancel forms and documents by subsystem.
 - **Queries**
 - o Allows users to search for specific information by category.
 - **Reference**
 - o Provides access to reference data tables by category.
 - **System Administration**
 - o Provides access to sub categories such as approvals, batch setup, configuration, security and workflow.
- NOTE:** System Administration does not appear for all users.
- **Utilities**
 - o Provides access to standard Pegasys report subscriptions, ad hoc reports, batch executions, manage external documents and access external applications. Users can also print certain forms, documents and reports from this menu.
 - **Bookmarks**
 - o A bookmark is a placeholder that allows quick access to saved pages instead of having to search for the page. Any query or reference data that displays a Bookmark icon as shown in **Figure 7** can be saved to the Bookmark Menu for future quick access.

Figure 7: Bookmark Icon



- o Once the Bookmark Icon is selected, it fills in with color to indicate it has been saved to the Bookmark Menu as shown in **Figure 8**.

Figure 8: Selected Bookmark Icon

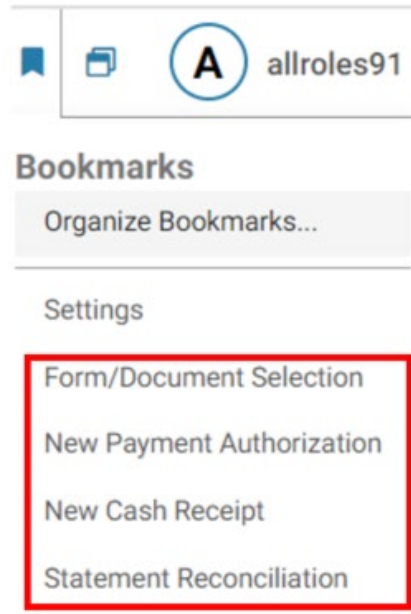


- o **The bookmark menu only appears if the user has any saved bookmarks.** **Figure 9** shows a drop-down menu of all saved bookmarks for this user and offers users the option to organize their bookmarks.



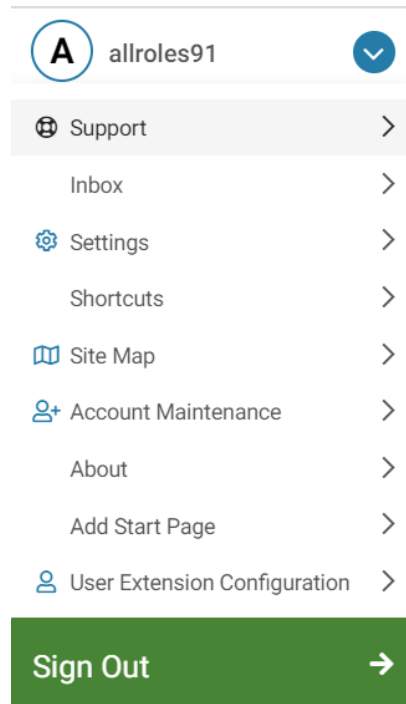
Pegasys Quick Reference Guide

Figure 9: Bookmark Menu With Saved Pages



Pegasys User ID Dropdown

Figure 10: User ID Dropdown





Pegasys Quick Reference Guide

User ID Menu Options:

- **Support**
 - Allows users to access Pegasys online help topics.
- **Inbox**
 - Returns users to their inbox (starting page). Here users can find their workflow tasks as well as completed tasks.
- **Settings**
 - Allows users to customize the look of Pegasys by setting styles, bookmarks, user defaults and advanced options.
- **Shortcuts**
 - Allows users to customize direct access to forms and documents.
- **Site Map**
 - Provides an alternative way to view menus and their contents.
- **Account Maintenance**
 - Provides a secondary access to the Settings option.
- **About**
 - Displays technical and legal information about the version of Pegasys.
- **Add Start Page**
 - Allows users to change to an alternate start page
- **User Extension Configuration**
 - Allows users to change their options for automatic tabbing and expanded sections.
- **Sign Out**
 - Allows users to exit Pegasys.

NOTE: Use the Sign Out button before closing the browser in order to close Pegasys properly. Selecting the “x” button first might cause an error when returning to Pegasys.

Inbox

How to open a workflow task listed in the Inbox.

1. When you navigate to the Inbox page, you might have **Approve Form, Correct Form or Ad-Hoc Routing Task** records in your inbox.
2. Highlight the workflow task record you wish to view, and select the **Open and Acquire** button.



Pegasys Quick Reference Guide

Figure 11: Inbox

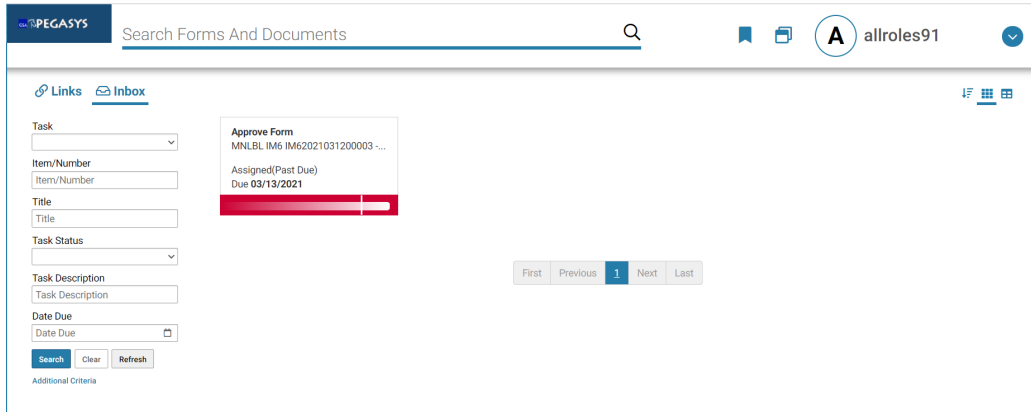


Figure 12: Inbox Item Details

APPROVE FORM MNLBL IM6 IM62021031 200003

Task			
Type	Approve Form	Assignment Date	03/12/2021
Item	MNLBL IM6	Expected Completion Date	03/13/2021
	IM62021031200003		
Title	MBIAE-VA2002	Priority	Medium
Task Description	Approve PENDINGAPPROVAL IM6 IM62021031200003 Form 363000	Task Status	Acquired
Document			
Document Type	IM6	Amendment/Modification Number	
Document Number	IM62021031200003	Security Organization	GSA
Document Date	03/12/2021	Form Creation Status	
Document Status	PENDINGAPPROVAL	Form Creation Step	
Total Transaction Amount	\$1,000.00	Accounting Period	06/2021
Fund Amount	\$1,000.00	Vendor Code	363000
Fund Currency	USD	Vendor Address Code	363000
Transaction Currency	USD	Vendor Name	VETERANS ADMINISTRATION
Contract Number			
Blanket Agreement Number			
Classification			
Document Description	FY2020 Management and Operations of the Integrated Acquisition Environment, D&B Data Rights		
Header Fields			
Assignment Code	MNLBL	Severable Service/SCAC Code	
Client Phone Number		Short Contract Number (GWAC)	
Contract Number		Multiyear	
Bidder's Last Name/Fund			

Approve Disapprove Open and Acquire View Release ...

3. For **Approve Form** and **Correct Form** tasks, the form will appear on the screen.



Pegasys Quick Reference Guide

Figure 13: Open Form

Momentum / Inbox / Header: IM6 R6 Manual IP IPAC Refund IM62021031200003 PENDINGAPPROVAL FULL FORM

SYSTEM MESSAGES
1 - 7 of 7 results

- Billing Document\Billing Document Line 1
PC0188W The transaction date must be within the External Direct Agreement agreement - 202101090009_start date and billing end date.
- Itemized Payment\IP Accounting Line 1
GS6786W The Line Period of Performance date range (06/03/2020 - 09/30/2020) does not fall within the Agreement billing start/end date range (01/01/2021 - 01/31/2021).
- Itemized Payment\IP Accounting Line 1
GS4644W The Referenced Agreement Line tracks spending details but no spending association has been made.
- Itemized Payment\IP Accounting Line 1

HEADER

Header Fixed Assets Header Accounting Lines Itemized Lines Approval Routing Memos

Expand All Collapse All

General

Document Type	IM6 R6 Manual IP IPAC Refur	Authorization Date	03/12/2021
Status	PENDINGAPPROVAL	Accounting Period	06/2021
Document Number	IM62021031200003	Reporting Accounting Period	06/2021
Title	MBIAE-VA2002	Document Classification	
Authorized By		Security Org	GSA
Post Code		Additional Payee Name	
<input type="checkbox"/> Automatic Reversal		* Accomplished Date	03/12/2021
Reversal Accounting Period		<input type="checkbox"/> Suppress Printing	

- If opening an **Ad-Hoc Routing Task**, then the Notification of Ad Hoc Mailing Router Workflow Task page will be displayed.
- If the ad-hoc routed item is a form, select **Correct** to open the form in edit mode.
- The **Ad-Hoc Routing Task** will remain in the Inbox until the assignment is manually completed. Therefore, when finished with the form, select **Complete** on the Notification Ad Hoc Mailing Router Workflow Task page.
- Approve Form** and **Correct Form** tasks will be removed automatically from the Inbox after the user has either approved or resubmitted the corrected form.
- When tasks are completed, they are moved from the Inbox tab to the Completed Tasks tab.



Pegasys Quick Reference Guide

Figure 14: Completed Tasks

The screenshot shows a task management interface with the following fields and controls:

- Navigation: [Links](#) and [Inbox](#)
- Task:
- Item/Number:
- Title:
- Task Status**: (highlighted with a red box)
- Task Description:
- Date Due:
- Buttons: [Search](#), [Clear](#), [Refresh](#)
- Additional Criteria: [Additional Criteria](#)

Task Card Details:

- Approve Form**
- MNLBL IM6 IM62021031200003 - MBIA...
- Complete
- Due 03/13/2021

User Preferences

To access user preferences, select the **Settings** hyperlink in the User ID Dropdown.

Figure 15: Settings within User ID Dropdown

The screenshot shows a user profile dropdown menu for 'allroles91' with the following options:

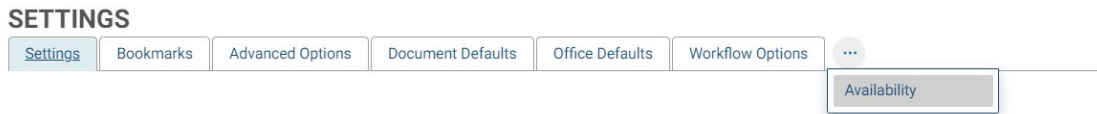
- Support >
- Inbox >
- Settings** > (highlighted with a red box)
- Shortcuts >
- Site Map >
- Account Maintenance >
- About >
- Add Start Page >
- User Extension Configuration >
- Sign Out →



Pegasys Quick Reference Guide

User Preferences Menu:

Figure 16: User Preferences Menu



- **Settings**
 - Allows users to choose the look and feel of Pegasys based on preset themes.
- **Bookmarks**
 - Allows users to organize bookmarks.
- **Advanced Options**
 - Allows users to specify a limit on the number of results returned when a search is performed.
- **Document Defaults**
 - Allows users to set defaults for Vendor, Accounting Template and Currency to be used when forms are created.
- **Office Defaults**
 - Allows users to set default for office addresses.
- **Workflow Options**
 - Allows users to view their workflow Options.
- **Availability**
 - Allows users to change their availability status. When a user's availability status is set to unavailable, their tasks will be routed to users designated as alternate assignees. Refer to Section 1 of Purchasing or Finance User Guides.