



Pegasys Quick Reference Guide

Introduction to Workflow

- All Purchasing Request and Order forms must be approved before they can be processed within Pegasys.
- The form's creator shall add the appropriate approvers on the form's Approval Routing page. All approvers must be added to the form.
- Multiple approvers can be added to the form at once using a routing list. For more information on creating a routing list, please see the Route Forms and Create Custom Routing Lists Quick Reference Guide.
- Upon submission, workflow automatically routes the form for approval to the inbox of the approving officials listed on the form.
- If multiple approvals are required on the form, Workflow routes the form to users in a fixed order determined by the type of approval, set forth by GSA Policy, and not by the order of the approvers listed on the form's Approval Routing page.
- After the final approval is applied, workflow automatically submits and processes the form.
- The form's submitter is the user associated with the processed document in Pegasys.

Adding Individual Approvers to a Form

When approvals are required for a form to process successfully, the proper approving officials must be added on the form's Approval Routing page before submission.

1. On the form, select the **Approval Routing** tab.



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Figure 1: Approval Routing List

Header: CH7 R7 Check Manual CR CH7202101240008 HELD FULL FORM / Approval Routing

APPROVAL ROUTING

Header | Accounting Lines | **Approval Routing** | Memos | Summary | Correspondence

No results

<input type="checkbox"/> Approver ID	Approver Name
--------------------------------------	---------------

Add Routing List | **Add User** | Remove

10 per page | Page 1 of 1

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

2. Select **Add User**.

Figure 2: Add Users

APPROVAL ROUTING

Header | Accounting Lines | **Approval Routing** | Memos | Summary | Correspondence

1 - 1 of 1 results

<input type="checkbox"/> Approver ID	Approver Name
<input type="checkbox"/> allroles91	All Roles 91 CGI

Add Routing List | **Add User** | Remove

10 per page | Page 1 of 1

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

3. Enter the **User ID** or **Name** of the form's approver in the appropriate fields.
4. Select **Search**.
5. Select the record for the approver of the form from the generated list.
6. Choose the **Select** button.



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7. The selected user will be added to the list of approvers on the Approval Routing page.
Repeat steps 3-6 to add additional approvers to the form.

Adding a List of Approvers to a Form

Multiple approving officials can be added at once to the Approval Routing page on a form by utilizing a routing list.

1. On the form, select the **Approval Routing** tab.
2. Select **Add Routing List**.

Figure 3: Select Add Routing List

Header: CH7 R7 Check Manual CR CH7202101240008 HELD FULL FORM / Approval Routing

APPROVAL ROUTING

Header | Accounting Lines | **Approval Routing** | Memos | Summary | Correspondence

No results

<input type="checkbox"/> Approver ID	Approver Name
--------------------------------------	---------------

[Add Routing List](#) [Add User](#) [Remove](#) 10 per page << Page 1 of 1 >>

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[Verify](#) [Save](#) [Submit](#) [Schedule](#) [Refresh](#) [Fund Currency](#) ...

3. Enter the **Routing List Code** or **Routing List Name** in the appropriate fields.
 - a. If the exact Routing List Code or Routing List Name is unknown, then the asterisk (*) may be used as a wildcard in the search.

NOTE: The Code is usually the correspondence symbol.
4. Select **Search**.
5. Select the record for the routing list from the generated list.



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Figure 4: Search Code

SEARCH - ROUTING LIST

Search Criteria

* Code

Name

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<input type="checkbox"/> Code	Name
<input type="checkbox"/> *	yvonnescott
<input type="checkbox"/> *R110GC*	Region 11 Counsel's Ofc
<input type="checkbox"/> 001	PR APPROVAL NLGRF
<input type="checkbox"/> 04552761	Purchase Request
<input type="checkbox"/> 05FF-08	SFF08 CERTIFIED INVOICE
<input type="checkbox"/> 08A-GMA-JW	GM&A Acquisition Request-Worthy
<input type="checkbox"/> 1	MyRoutingList
<input type="checkbox"/> 10000D7	D7 routing list
<input type="checkbox"/> 10FF	Fleet Management
<input type="checkbox"/> 10P23A	Credit Card Purchases - Boise PMO

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6. Choose the **Select** button.
7. The selected user saved in the routing list will be added to the list of approvers on the **Approval Routing** page.
8. Repeat steps 3-7 to add additional approvers to the form.