Pegasys Quick Reference Guide

Creating a Purchase Request: Intro

- The request records the intent to buy goods or services. While the request is not legally binding, it commits funds for a future purchase.
- Fields with red asterisks (*) are mandatory for Pegasys processes but may not include all fields required by GSA policy.
- In Pegasys, users create one document type to record both non-itemized and itemized transactions.
- For detailed information, please refer to the Reservations and Requests chapter of the Purchasing User Guide.

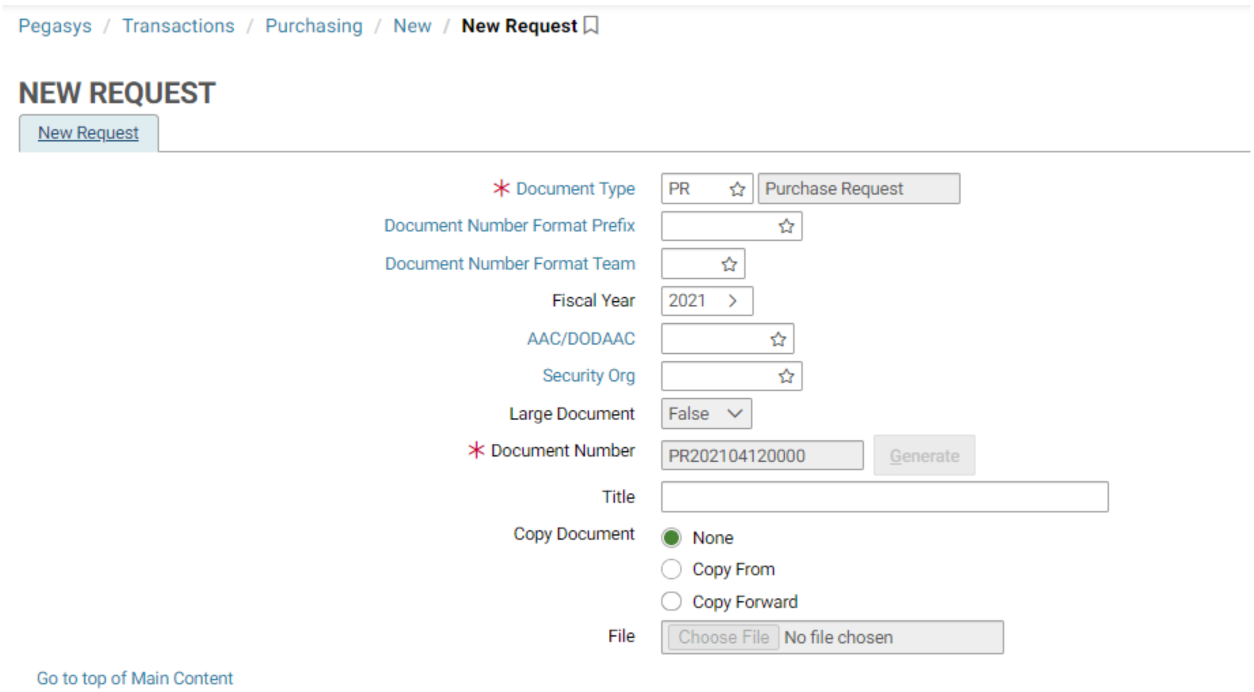
GSA Policy

- All requests require the following approvals: Accounting Classification, Funds Authorization and Manager.
- The Vendor Code field is optional on the request. Use the Suggested Vendors page to recommend vendors.
- If needed, the user can list additional Suggested Vendors in an attachment.
- If vendor is not listed in the Vendor Maintenance table, contact your Finance Center to have the vendor set up in Pegasys.
- The Requisitioner and the name entered on the Delivery office address tab page will receive an email notification if receipt is not logged at the time the invoice is logged.

Creating a Purchase Request

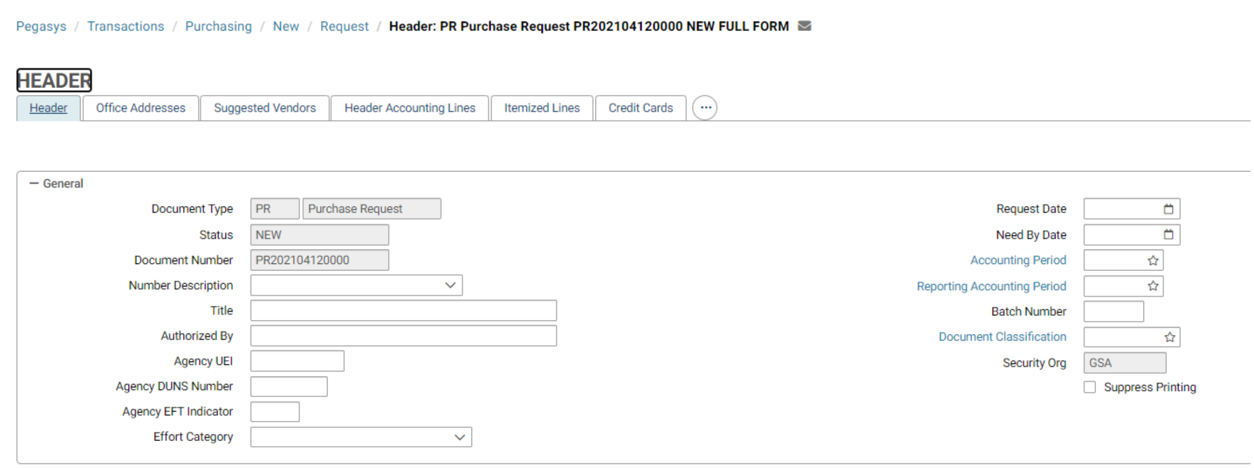
1. Select **Transactions** → **Purchasing** → **New** → **Request** from the Pegasys menu bar.
2. Enter **PR** in the Document Type field.
3. Select **Generate**. Once the document number is generated, the [**Generate**] button will be disabled, prohibiting multiple selection attempts so that sequence numbers are not skipped.
4. Leave the Security Org and Document Title fields blank.
    a. The user's default Security Org will populate the field on the Header page. The default Security Org is GSA.
5. Select **Finish** to display the form's Header page.

Figure 1: New Request Page



6. Enter the requester's name in the **Authorized By** field.
    a. **Request Date**, **Accounting Period** and **Reporting Accounting Period** fields will default to the current date when the form is Verified or Processed.

Figure 2: Header Tab

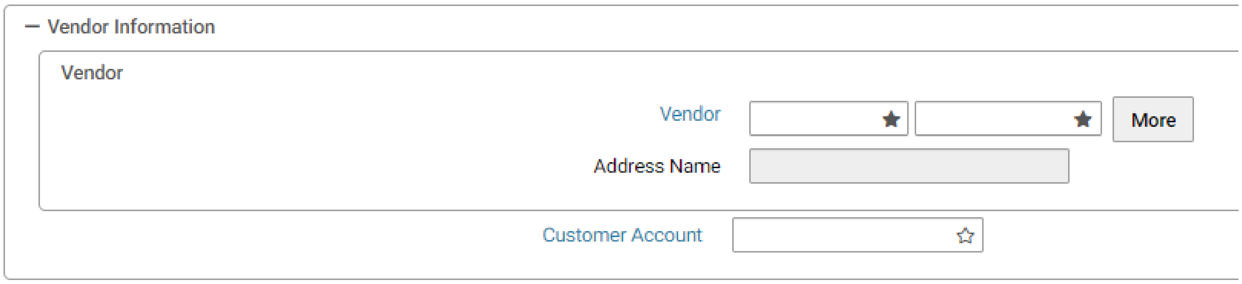


7. Enter or search for the **Vendor Code** in the Vendor Information box.
    a. To search for a Vendor Code, select the **Code** reference field link. Enter the appropriate search criteria, and select the **Search** button.

b. Select the **Select** button for the vendor you wish to add.

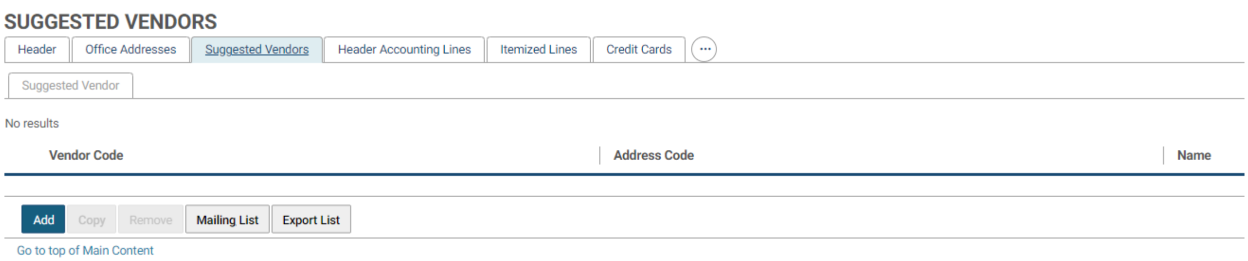
c. If you have Favorites set up, select a vendor from your list.

Figure 3: Vendor Section



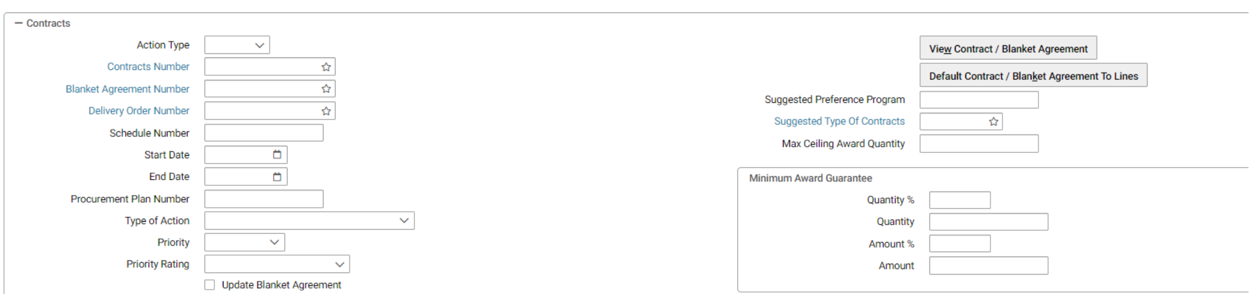
8. Codes for suggested vendors can be entered by selecting the **Suggested Vendors** tab and selecting **Add**.

Figure 4: Suggested Vendors Tab



9. Enter the **Contract Number** in the Contracts group box.

Figure 5: Contracts Section

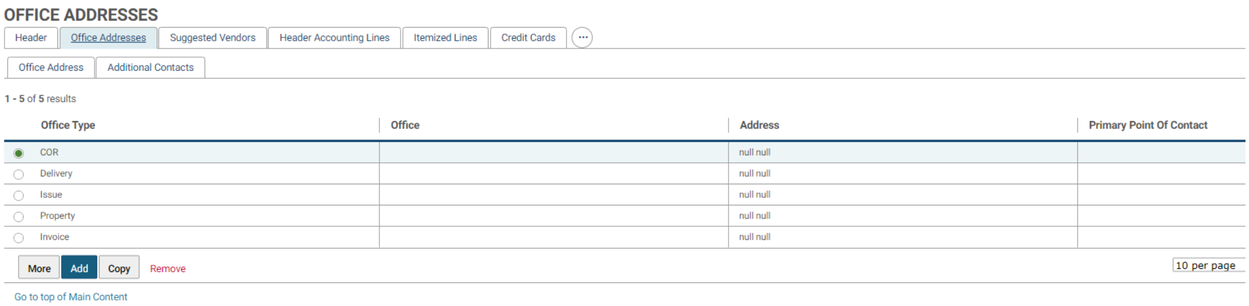


10. Select the **Office Addresses** tab.

11. Select the appropriate **Office Type**.

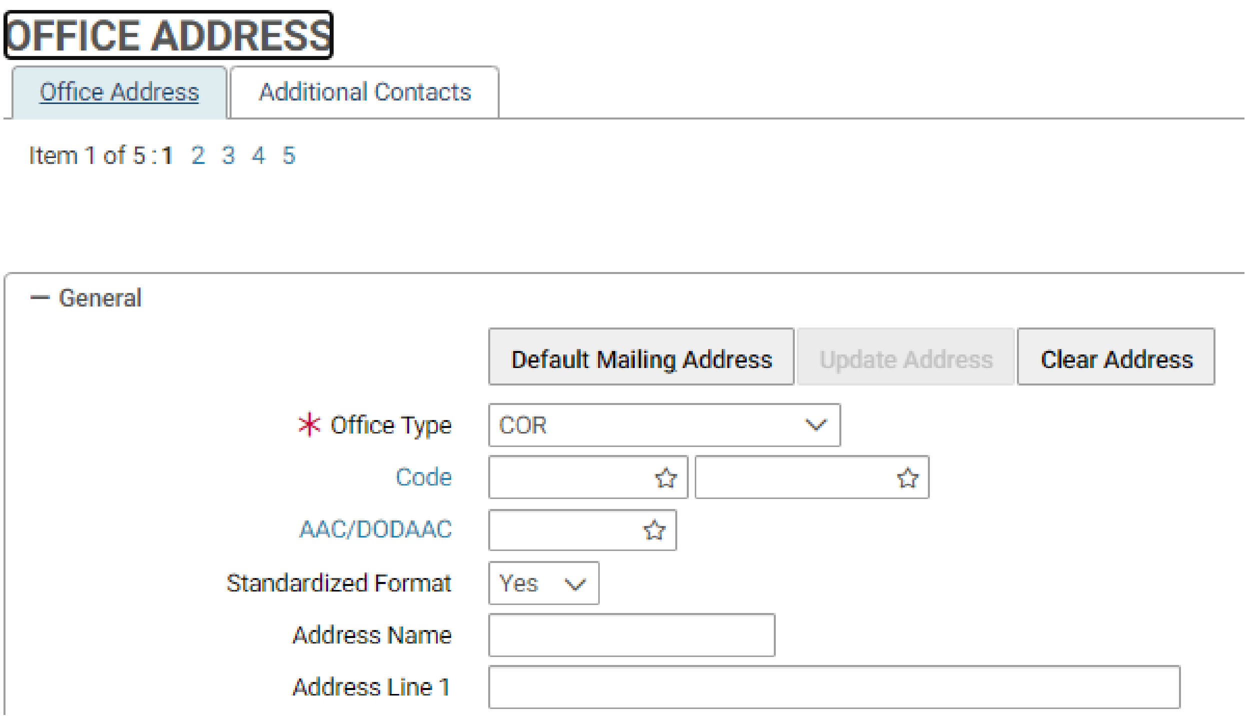
12. Select the **Office Address** link.

Figure 6: Office Addresses Tab



13. Enter the appropriate **address code** in the **Code** field.
14. Select **Address** to populate the fields in the Address Information section.

Figure 7: Office Address Sub Tab

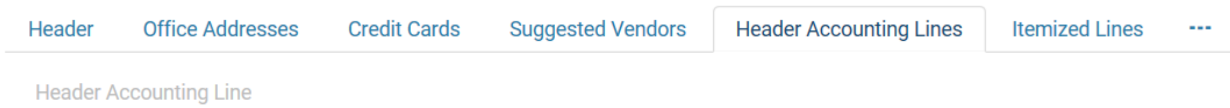


15.

16. To return to the Office Addresses page, select the **Office Addresses** link.
    a. To enter multiple office addresses, repeat steps 12-15.

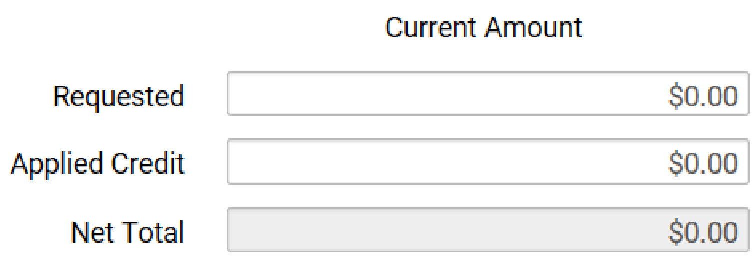
    NOTE: Additional Contacts can be added to any entered addresses, and multiple secondary contacts can be entered for each office address.
17. Select the **Header Accounting Lines** tab.
18. Select **Add**.

Figure 8: Header Accounting Lines Tab and Sub Tab



19. Enter the dollar amount in the **Requested** field.

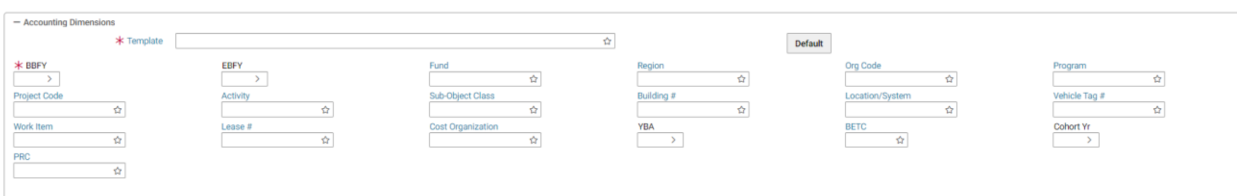
Figure 9: Requested Field



20. Enter the **Template** in the Accounting Dimensions group box.
    a. To Search, select the **Template** link. Enter the applicable search criteria, and select **Search**. Find the appropriate template record, and select the corresponding **Select** button. The selected template will populate in the Template field.

NOTE: Select the Default button to populate the template field if using a template from your favorites.

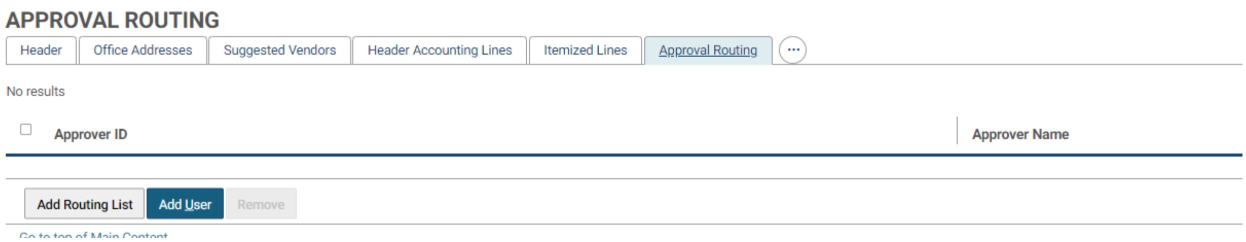
Figure 10: Accounting Dimensions Section



21. Enter any other required accounting elements or Agreements.
22. Enter necessary information in the **Description** field.
23. Select the **Header Accounting Lines** link to return.
24. To add additional accounting lines, repeat steps 18-24.
    a. A line may be copied by selecting the desired line and selecting **Copy**. Select the newly copied line, select the **Header Accounting Lines** page and make the necessary modifications.
    b. A line may be deleted by selecting the appropriate line and selecting **Remove**.

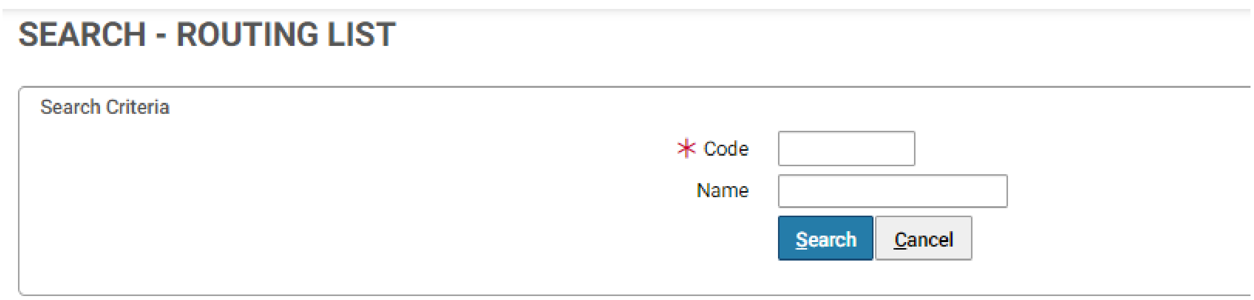
25. Select the **Summary** tab to view a summary of the header accounting lines or to make changes.
26. Select the **Approval Routing** tab.
27. Select **Add User** or **Add Routing List**.

Figure 11: Approval Routing Tab



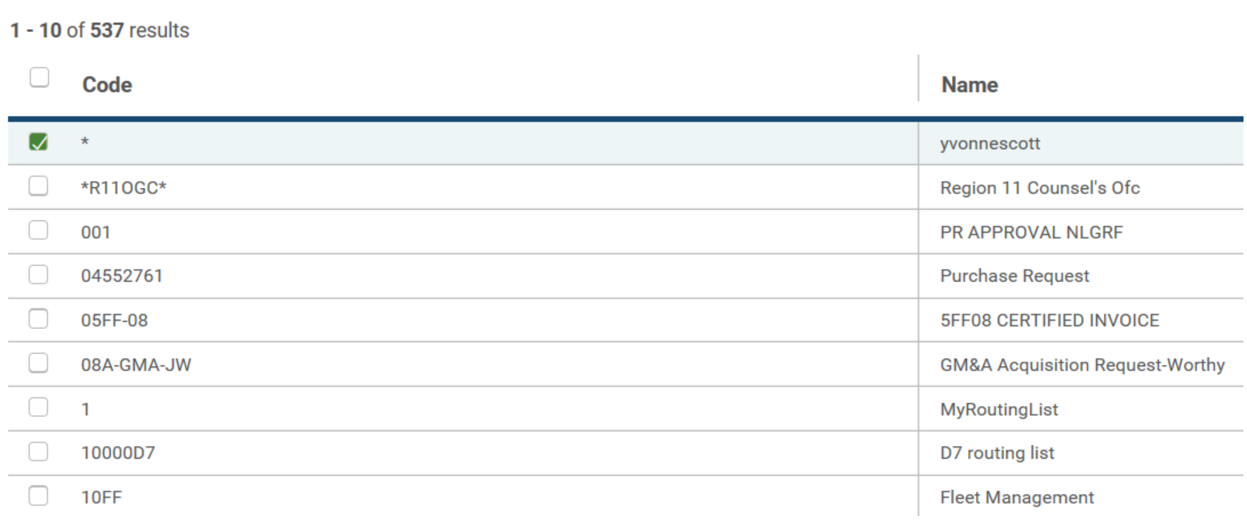
28. Enter the appropriate search criteria, and select **Search**.

Figure 12: Search – Routing List



29. Select checkbox to the left of the user or routing list you wish to add.

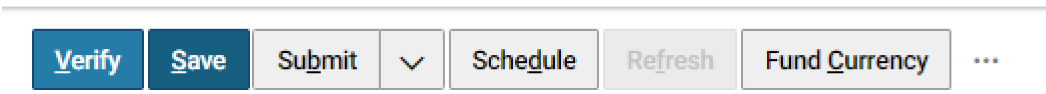
Figure 13: Item Collection Table


1 - 10 of 537 results

Code	Name
*	yvonnescott
R11OGC	Region 11 Counsel's Ofc
001	PR APPROVAL NLGRF
04552761	Purchase Request
05FF-08	5FF08 CERTIFIED INVOICE
08A-GMA-JW	GM&A Acquisition Request-Worthy
1	MyRoutingList
10000D7	D7 routing list
10FF	Fleet Management

30. Select **Save** and then **Verify**.
    a. Correct any errors that are displayed.
31. Select the **Submit** at the bottom of the page.

Figure 14: Action Buttons



NOTE: To set a Workflow Priority of Urgent when submitting a form for approval, select the **Submit dropdown arrow** and then select **Urgent**.