



Pegasys Quick Reference Guide

Creating a Training Order: Intro

- Orders are created in Pegasys when a decision is made to purchase goods or services from a vendor.
- Once approved, the Training Order form (GSA Form 300) is processed to obligate funds. The document can then be printed and sent to the vendor. Orders may later be associated to future receipts, invoices and payments. Sometimes, a Training Request (TR) can precede an order.
- 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 Training Orders chapter of the Purchasing User Guide.

GSA Policy

- All training orders require Accounting Classification, Funds Authorization, Manager and Training Coordinator approvals.
- Only a processed Training Order can be amended. To amend an Order, select **Transactions** → **Purchasing** → **Amend** → **Training Order** from the Pegasys menu bar.
- The Requisitioner and names on the Delivery and Order office address tab pages will receive an email notification when a receipt is required for payment.
- The vendor name or designated agent cannot be changed once a training order is created except with the use of a Novation.

Creating a Training Order

1. Select **Transactions** → **Purchasing** → **New** → **Training Order** from the Pegasys menu bar.
2. Enter the appropriate **Document Type**.
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.



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Figure 1: New Training Order

[Pegasys](#) / [Transactions](#) / [Purchasing](#) / [New](#) / [New Training Order](#)

NEW TRAINING ORDER

[New Training Order](#)

* Document Type	FW	FSS-Training Order
Document Number Format Prefix	<input type="text"/>	
Fiscal Year	2021	
AAC/DODAAC	<input type="text"/>	
Security Org	<input type="text"/>	
Document Number	FW0001935	Generate
Title	<input type="text"/>	
Copy Document	<input checked="" type="radio"/> None <input type="radio"/> Copy From <input type="radio"/> Copy Forward	
File	Choose File No file chosen	

[Go to top of Main Content](#)

[< Back](#) [Finish](#) [Cancel](#)

5. To copy forward the Training Request, follow **steps 6-10**; otherwise, skip to **step 11**.
6. Select the **Copy Forward** button.
7. Select **Next**.
8. Enter **TR** in the Document Type field.



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9. Enter the document number of the appropriate **Training Request** in the Document Number field.
10. Select **Search**.

Figure 2: Training Request Copy From

COPY FROM

[Copy From](#)

Search Criteria

Document Type	TR ☆	Training Request ☆	Accounting Period	<input type="text"/>
Document Number	<input type="text"/>		Accounting Period	<input type="text"/>
Document Status	Processed ▾		From Date	<input type="text"/>
User ID	<input type="text"/>		To Date	<input type="text"/>
Title	<input type="text"/>		Vendor	<input type="text"/> ☆ <input type="text"/> ☆
<input type="button" value="Search"/>				

11. Select the appropriate document from which you wish to copy forward.
12. Select **Finish**.
13. If the copy forward was used, all of the corresponding fields from the TR, except for Suggested Vendors, will be on the new Training Order.
14. The user’s default Security Org (which is GSA) will populate the field on the Header page.
15. Enter the purchaser’s name in the **Ordered By** field.

Figure 3: Header

HEADER

[Header](#) [Fixed Assets](#) [Office Addresses](#) [Employees](#) [Header Accounting Lines](#) [Itemized Lines](#) [...](#)

— General

Document Type	FW	FSS-Training Order	Order Date	<input type="text"/>
Status	NEW		Accounting Period	<input type="text"/> ☆
Document Number	FW0001935		Reporting Accounting Period	<input type="text"/> ☆
Title	<input type="text"/>		Security Org	GSA
Ordered By	<input type="text"/>		<input type="checkbox"/> Suppress Printing	
Agency UEI	<input type="text"/>		<input type="checkbox"/> Fast Pay	
Agency DUNS Number	<input type="text"/>		<input type="checkbox"/> Invoice Required	
Agency EFT Indicator	<input type="text"/>		<input type="checkbox"/> Receipt Required	
Disbursing Office	<input type="text"/> ☆			

- a. Order Date, Acctg Period and Reporting Acctg Period fields will default to the current date when the form is Verified or Submitted.
 - b. The Document Number will be copied forward from the TR and will populate the Title field.
16. Enter or search for the Vendor Code.



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- a. If searching: The Search - Vendor Code page displays. Enter the applicable search criteria, and select Search. Find the appropriate vendor record, and select the corresponding Select button.
- b. The Vendor Name field will populate from the Vendor Code that is selected.

Figure 4: Vendor Information

Vendor Information

Vendor

* Vendor ★ ★ More

Address Name

Customer Account ☆

17. Enter the appropriate code in the **Remit To Address** field.

Figure 5: Customer Account

Customer Account ☆

Business Classification

Small Minority-Owned Women-Owned

Remit To Address ★ More

18. If applicable, enter a Contract/Order or Lease Number if not copied forward from the TR.

Figure 6: Contracts Detail

Contracts

Contracts Number ☆

Blanket Agreement Number ☆

Delivery Order Number ☆

Expiration Date

Type of Action

Order Type

View Contract / Blanket Agreement

Default Contract / Blanket Agreement To Lines

19. If applicable, enter the **Discount Terms** about the order.



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Figure 7: Discount Terms

— Discount Terms

Tender Type

Inspection Days

Acceptance Days

Negotiated Payment Days

Discounts

Percentage (%)

<input type="text"/>	0.000
<input type="text"/>	0.000
<input type="text"/>	0.000
<input type="text"/>	0.000

20. Select the **Office Addresses** tab.
21. Select the appropriate **Office Type**, and select the **Office Address** sub-tab.
 - a. **Delivery, Invoice** and **Order** office addresses are required on a Training Order.
 - b. Do not enter the COTR address for the Training Form.

Figure 8: Office Type

OFFICE ADDRESSES

Header Fixed Assets Office Addresses Employees Header Accou

Office Address Additional Contacts

1 - 3 of 3 results

Office Type

<input type="radio"/>	Delivery
<input type="radio"/>	Invoice
<input checked="" type="radio"/>	Order

More Add Copy Remove



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22. Enter the appropriate address in the **Address Name** field.

Figure 9: Office Addresses

OFFICE ADDRESS

[Office Address](#) [Additional Contacts](#)

Item 1 of 3 : 1 2 3

— General

* Office Type

Code

AAC/DODAAC

Standardized Format

Address Name

Address Line 1

City

State

Postal Code

County

Country

Employee

Grade

Preferred Method of Contact

Phone

...

23. Select the **Office Addresses** tab to return.

24. Repeat steps 18-21 as needed.

NOTE: Additional Contacts can be added to any entered addresses, and multiple secondary contacts can be entered for each office address.

25. Select the **Course Information** tab.

26. Enter or search for the **Course Code** and **Course Title**.



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27. Enter the **Program Office** and **Class Sequence**, if known.

Figure 10: Course Information

General

Course ☆

* Course Code

* Course Title

Program Office

Class Sequence

28. Enter the Start Date, End Date and/or Drop Date.

Figure 11: Course Dates

Course Dates

Start Date

End Date

Drop Date

29. Enter the **Duty** and **Non-duty** hours in the **Course Hours** group box.

Figure 12: Course Hours

Course Hours

Duty Hours	<input type="text" value="24.000000"/>
Non-duty	<input type="text" value="0.000000"/>
Total	<input type="text"/>

30. Enter the Training Address, or check the Address same as Vendor box.

Figure 13: Training Address

Training Address

Standardized Format Address same as Vendor

Address Name

Address Line 1

31. Enter the **Objective** and **Benefits** of the training course.



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32. Select the **Employees** tab to enter employees who will attend the class.
33. Select **Add**.

Figure 14: Select the Add Button

The screenshot shows the 'EMPLOYEES' section of a software interface. At the top, there are four tabs: 'Header', 'Fixed Assets', 'Office Addresses', and 'Employees'. The 'Employees' tab is selected and highlighted in blue. Below the tabs, it says '1 - 1 of 1 results'. There is a checkbox next to the label 'Code'. Below this, a horizontal line separates the header from the data row. The data row contains a checkbox and the value '100089844'. At the bottom of the data row, there are two buttons: 'Add' (highlighted in blue) and 'Remove' (greyed out).

34. Enter the appropriate employee information, and select **Search**.

Figure 15: Search Criteria

The screenshot shows the 'EMPLOYEE' search criteria form. The title 'EMPLOYEE' is at the top left. Below it, the text 'Search Criteria' is followed by four input fields: 'Employee', 'First Name' (containing 'Jovanka'), 'Middle Name', and 'Last Name'. At the bottom right of the form are two buttons: 'Search' (highlighted in blue) and 'Cancel' (greyed out).

35. Select the appropriate employee from the generated list, and choose **Select** to add the employee to the Training Order.



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Figure 16: Employee Search Results

<input type="checkbox"/> Employee	First Name
<input type="checkbox"/> 100089844	JOVANKA

Select

36. Select the Header Accounting Lines tab.

37. Select **Add**, or select the appropriate line you wish to open. Select the Header Accounting Line.

a. If you copied forward a TR, specific line information from the TR will be displayed.

Figure 17: Header Accounting Lines

HEADER ACCOUNTING LINES

Header Fixed Assets Office Addresses Employees Header Accounting Lines Itemized Lines ...

Header Accounting Line

1 - 1 of 1 results

<input type="checkbox"/>	Line Number	Amount	Transaction Type	IPP Line Number	IPP Description
<input checked="" type="checkbox"/>	1	\$0.00			
Total Header Funded Amou		\$0.00			

References... **Add** Copy ▼ Remove Reset Replace

38. Enter the appropriate amounts in the **Line Amounts** group box.

Figure 18: Line Amounts

— Line Amounts

Current Amount

Ordered	<input type="text" value="\$0.00"/>
Applied Credit	<input type="text" value="\$0.00"/>
Net Total	<input type="text" value="\$0.00"/>



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39. If a TR was copied forward, **skip to Step 44**; otherwise, **continue with Step 40**.
40. Select the **Final** checkbox in the **Document Reference** group box.

Figure 19: Document Reference

— Document Reference

Type: TR ☆ Number: TR20210104005 ☆ ExhibitItem: 1 ☆ Accounting: 1 ☆

Final Misc Liquidate Items

View Default

41. Enter or search for the **Template** in the **Accounting Dimensions** group box.
42. Once you have selected the **Template**, select **Default** to populate the fields in the **Accounting Dimensions** group box.
 - a. Complete any other required accounting elements that were not populated by the accounting template.

Figure 20: Accounting Dimensions

— Accounting Dimensions

* Template [Search Field] Default

* BBFY [Dropdown] EBFY [Dropdown] Fund [Dropdown] Region [Dropdown] Org Code [Dropdown] Program [Dropdown]

Project Code [Dropdown] Activity [Dropdown] Sub-Object Class [Dropdown] Building # [Dropdown] Location/System [Dropdown] Vehicle Tag # [Dropdown]

Work Item [Dropdown] Lease # [Dropdown] Cost Organization [Dropdown] YBA [Dropdown] BETC [Dropdown] Cohort Yr [Dropdown]

PRC [Dropdown]

43. Enter information about the line in the **Description** field.
44. Select the **Header Accounting Lines** sub-tab to return.
45. New lines can be created by selecting **Add** and **repeating steps 37-44**.
 - a. Lines can be copied by selecting the appropriate line and selecting Copy; you can then select the Header Accounting Line link to open the new line and make necessary changes.
 - b. Lines can be deleted by selecting the appropriate line and selecting Remove.
46. Select the **Approval Routing** tab.
47. Select **Add User** or **Add Routing List**.



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Figure 21: Approval Routing

APPROVAL ROUTING

Header | Fixed Assets | Office Addresses | Employees | Header Accounting Lines | Approval Routing | ...

No results

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

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

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

Figure 22: Search Criteria

SEARCH

Search Criteria

User ID

Name

Search

49. Select the **Select** button to add the user or routing list required.

Figure 23: Select User

Principal ID

<input type="checkbox"/> allroles90

50. Select **Save** and then **Verify**.

- a. Any errors will be displayed. If necessary, correct the errors and select to Verify again.

51. Select **Submit**.

Figure 24: Submit

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

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