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.

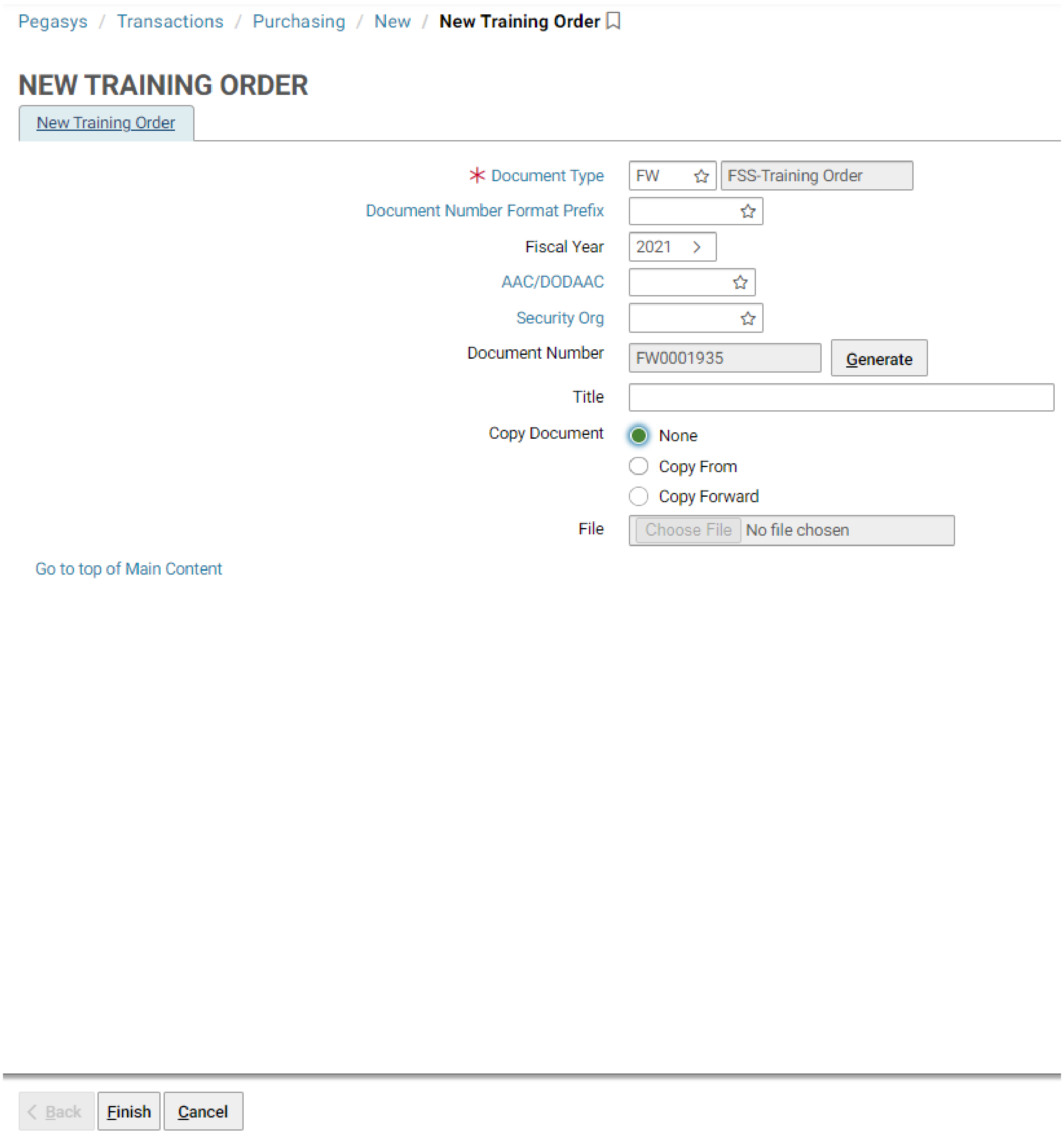
GSA Policy

- 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.

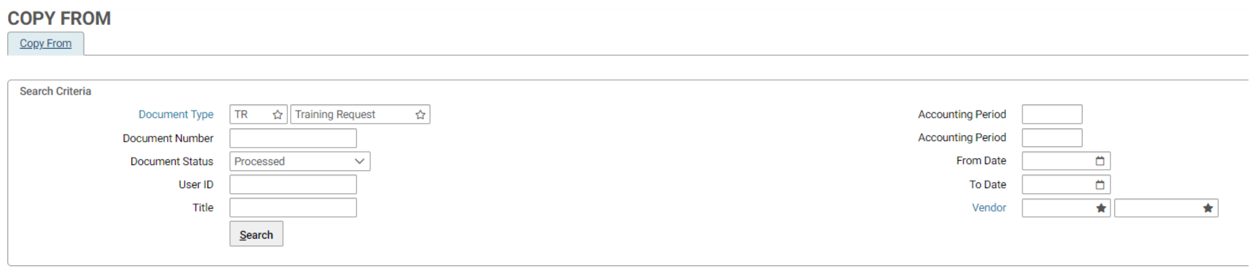
Figure 1: New Training Order



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.

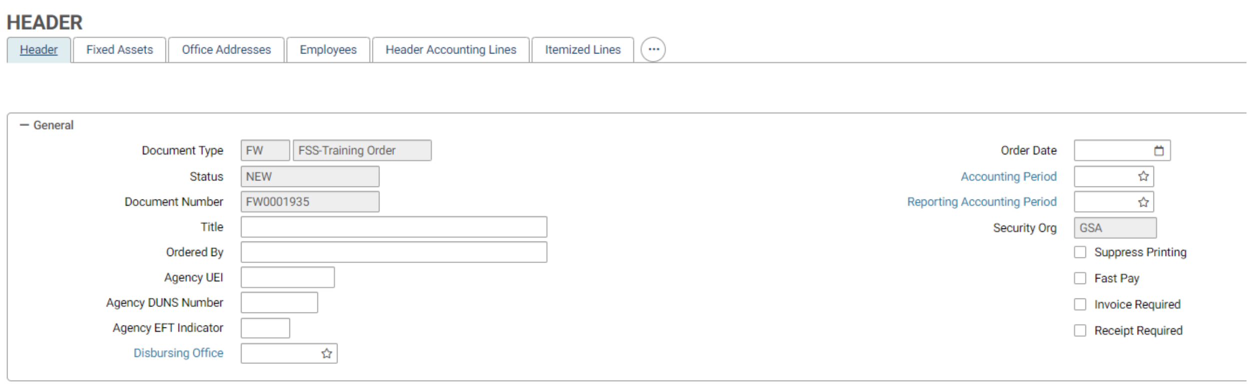
9. Enter the document number of the appropriate **Training Request** in the Document Number field.
10. Select **Search**.

Figure 2: Training Request Copy From



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

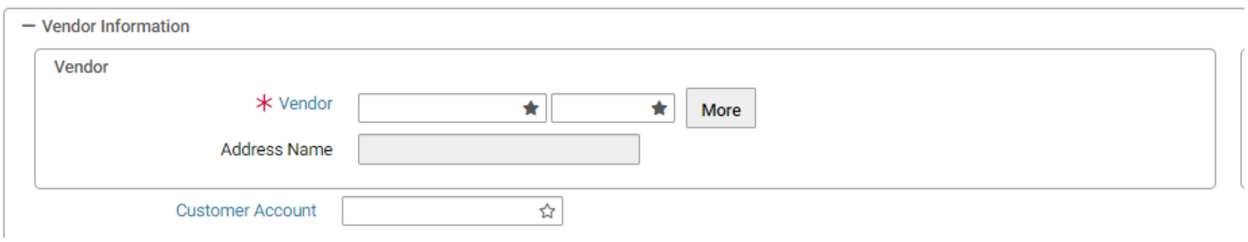


   a. Order Date, Acctg Period and Reporting Acctg Period fields will default to the current date when the form is Verified or Submitted.
   b. The Document Number will be copied forward from the TR and will populate the Title field.

16. Enter or search for the Vendor Code.

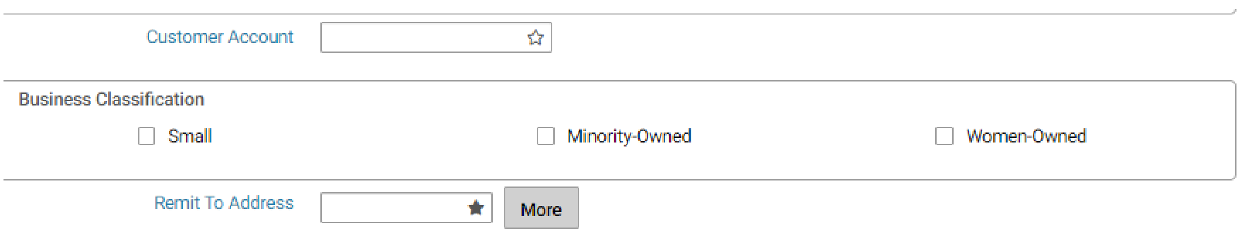
a. If searching: The Search - Vendor Code page displays. Enter the applicable search criteria, and select Search. Find the appropriate vendor record, and select the corresponding Select button.
b. The Vendor Name field will populate from the Vendor Code that is selected.

Figure 4: Vendor Information



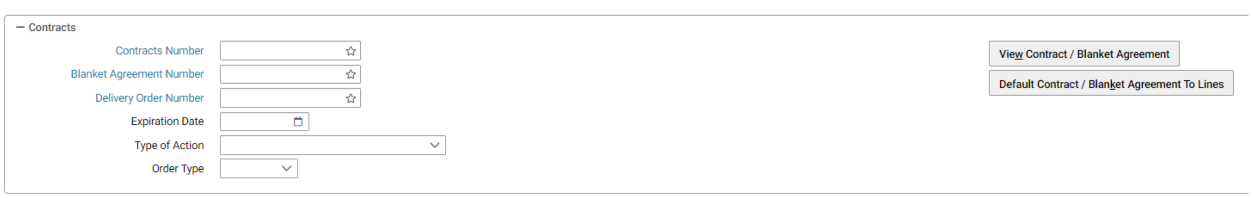
17. Enter the appropriate code in the **Remit To Address** field.

Figure 5: Customer Account



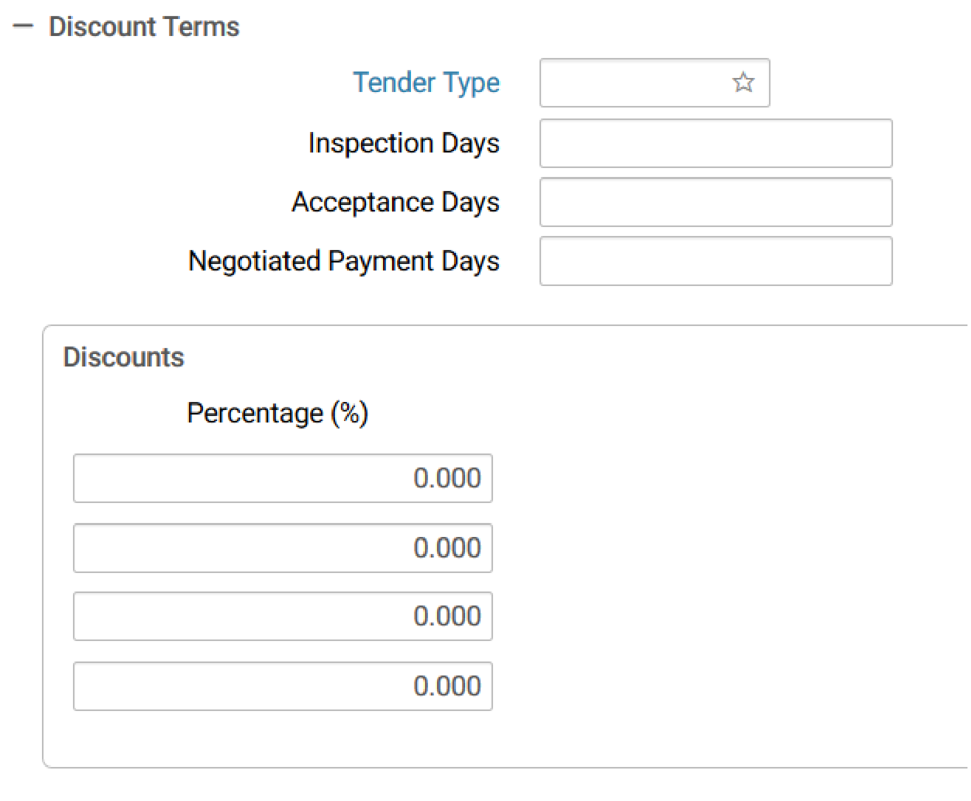
18. If applicable, enter a Contract/Order or Lease Number if not copied forward from the TR.

Figure 6: Contracts Detail



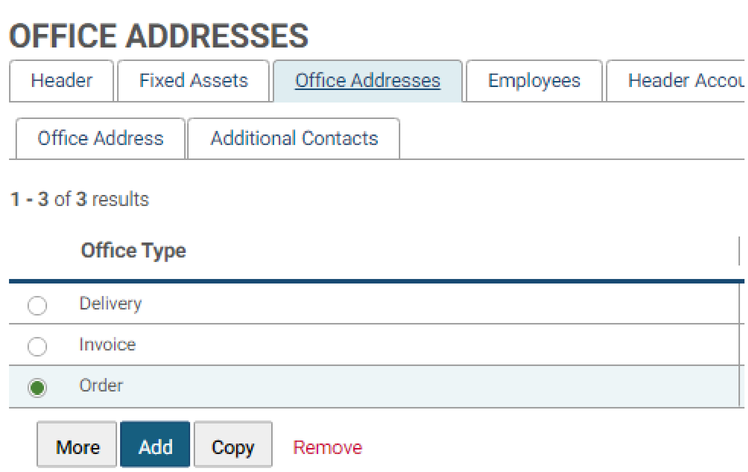
19. If applicable, enter the **Discount Terms** about the order.

Figure 7: Discount Terms



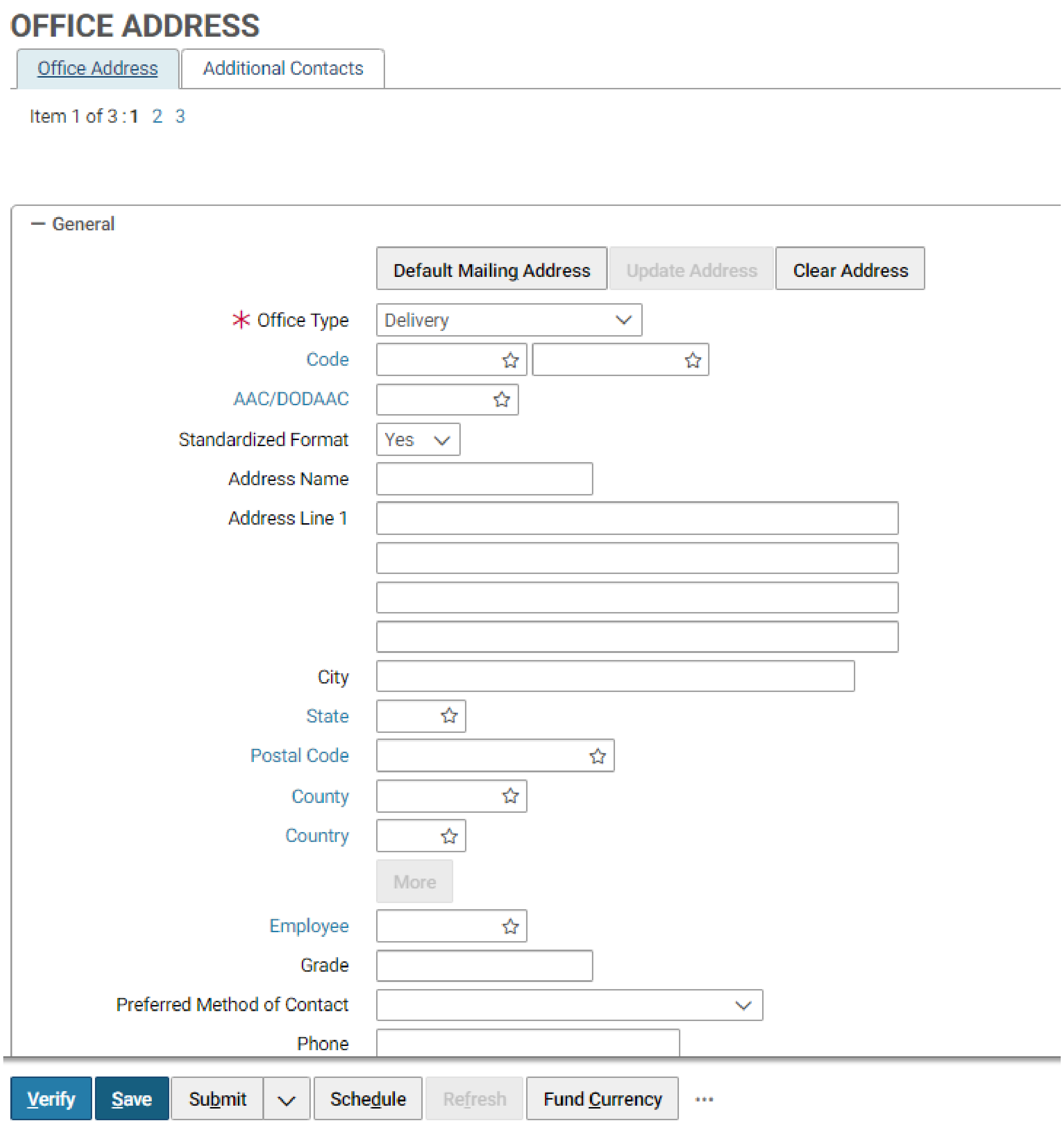
20. Select the **Office Addresses** tab.
21. Select the appropriate **Office Type**, and select the **Office Address** sub-tab.
    a. **Delivery**, **Invoice** and **Order** office addresses are required on a Training Order.
    b. Do not enter the COTR address for the Training Form.

Figure 8: Office Type



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

Figure 9: Office Addresses



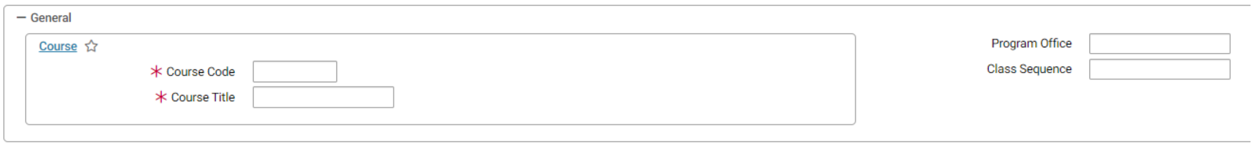
23. Select the **Office Addresses** tab to return.
24. Repeat steps 18-21 as needed.

    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**.

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

Figure 10: Course Information

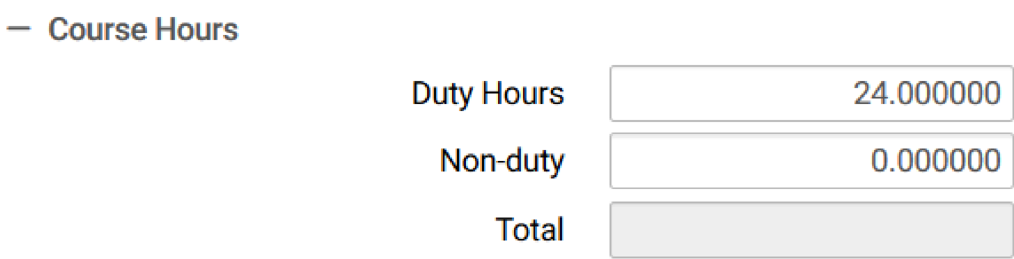


28. Enter the Start Date, End Date and/or Drop Date.

Figure 11: Course Dates

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

Figure 12: Course Hours



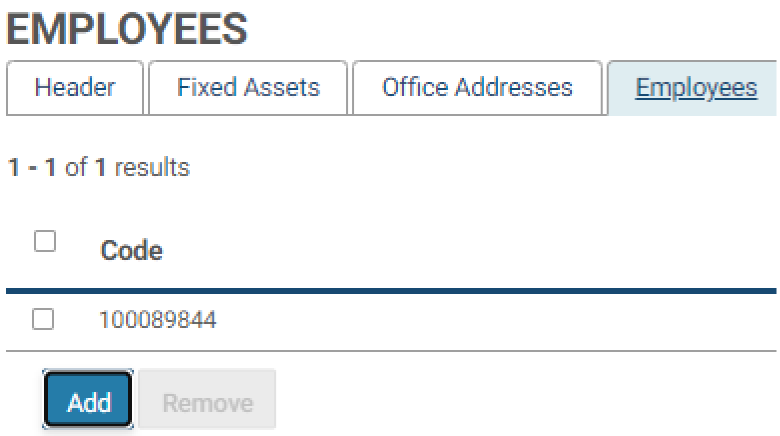
30. Enter the Training Address, or check the Address same as Vendor box.

Figure 13: Training Address

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

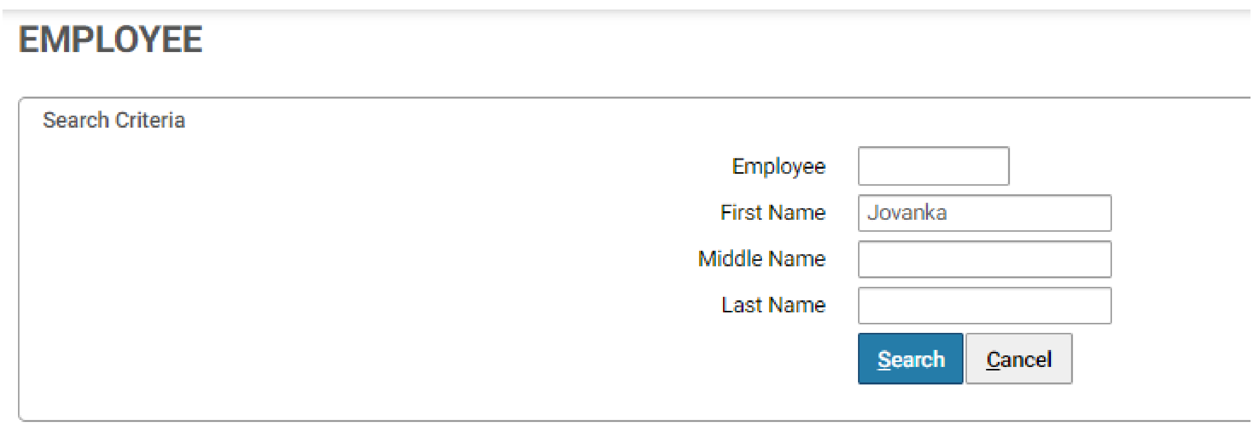
32. Select the **Employees** tab to enter employees who will attend the class.
33. Select **Add**.

Figure 14: Select the Add Button



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

Figure 15: Search Criteria

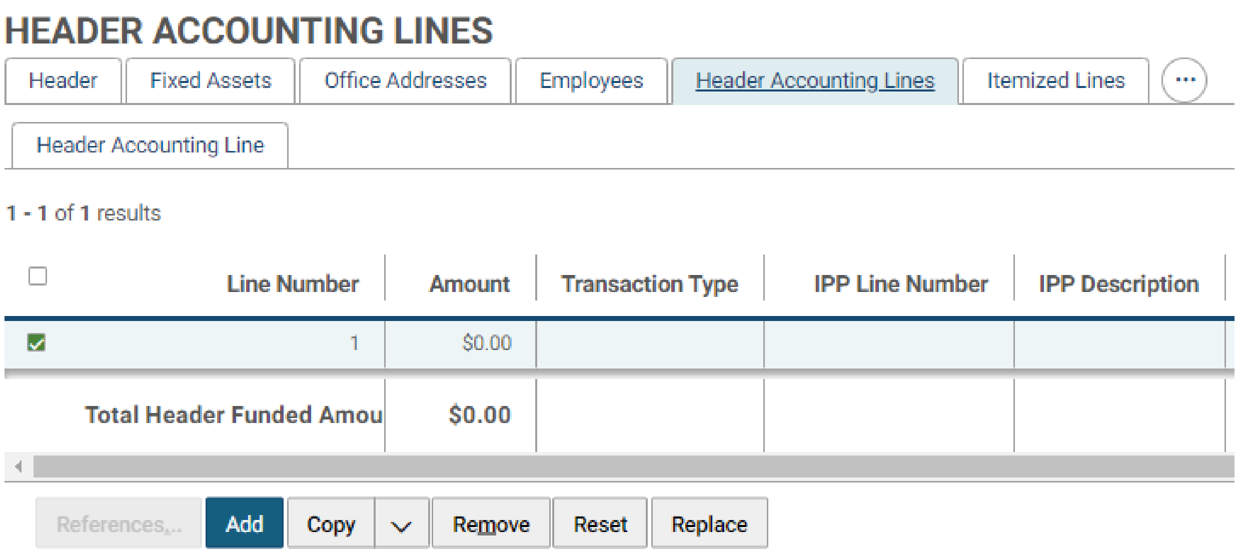


35. Select the appropriate employee from the generated list, and choose **Select** to add the employee to the Training Order.

Figure 16: Employee Search Results

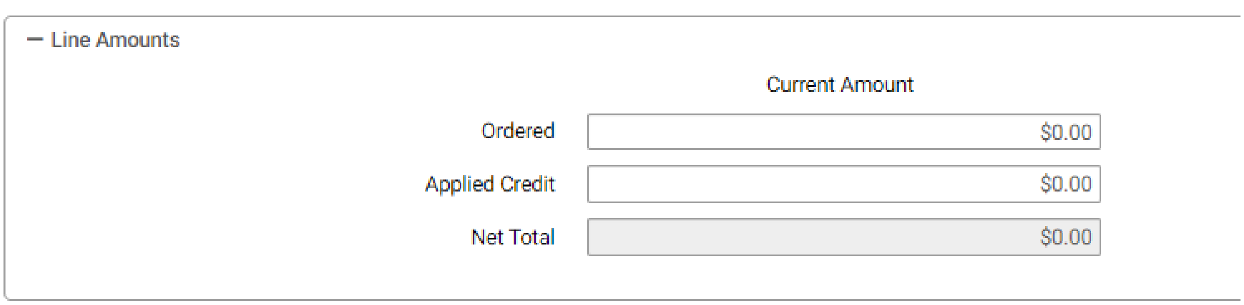
36. Select the Header Accounting Lines tab.
37. Select **Add**, or select the appropriate line you wish to open. Select the Header Accounting Line.
    a. If you copied forward a TR, specific line information from the TR will be displayed.

Figure 17: Header Accounting Lines



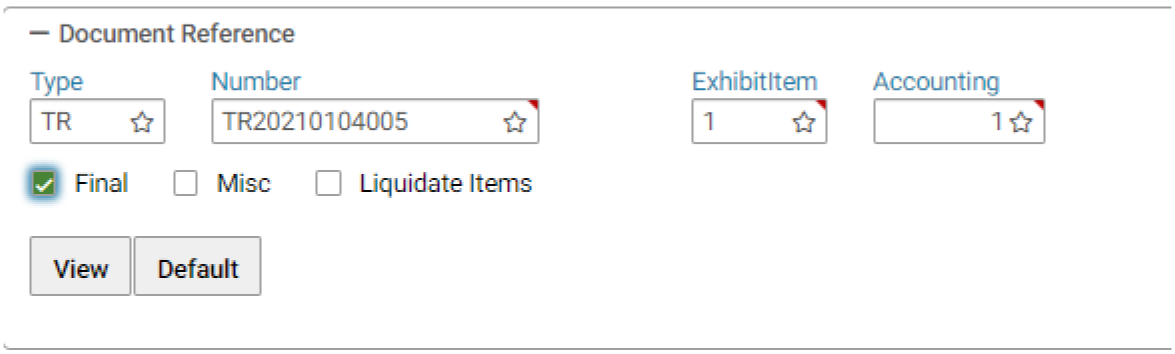
38. Enter the appropriate amounts in the **Line Amounts** group box.

Figure 18: Line Amounts



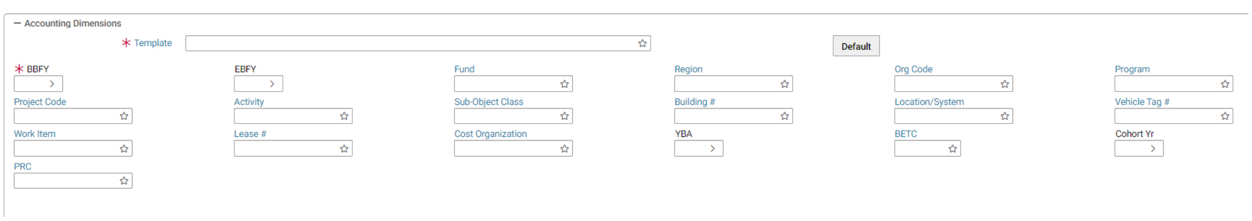
39. If a TR was copied forward, **skip to Step 44**; otherwise, **continue with Step 40**.
40. Select the **Final** checkbox in the **Document Reference** group box.

Figure 19: Document Reference



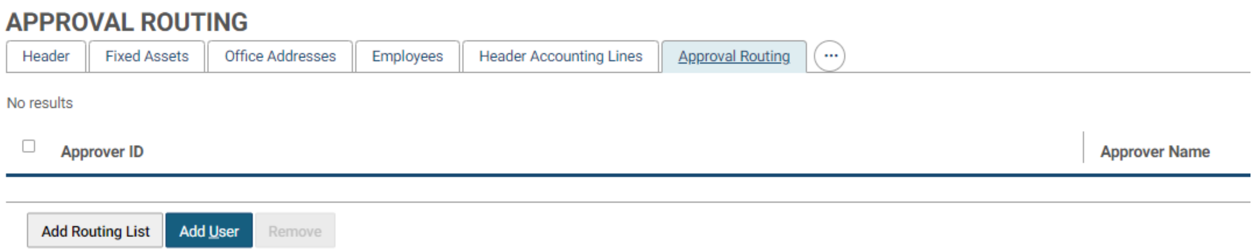
41. Enter or search for the **Template** in the **Accounting Dimensions** group box.
42. Once you have selected the **Template**, select **Default** to populate the fields in the **Accounting Dimensions** group box.
    a. Complete any other required accounting elements that were not populated by the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

Figure 20: Accounting Dimensions



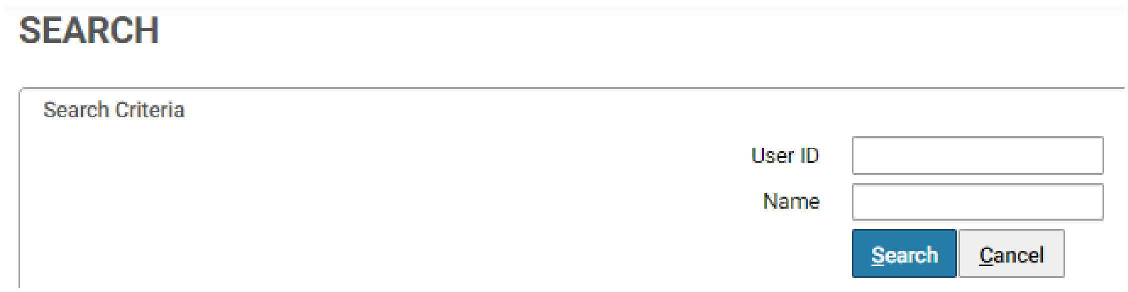
43. Enter information about the line in the **Description** field.
44. Select the **Header Accounting Lines** sub-tab to return.
45. New lines can be created by selecting **Add** and **repeating steps 37-44**.
    a. Lines can be copied by selecting the appropriate line and selecting Copy; you can then 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**.

Figure 21: Approval Routing



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

Figure 22: Search Criteria

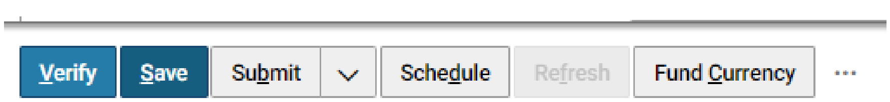


49. Select the **Select** button to add the user or routing list required.

Figure 23: Select User

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



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