



# Pegasys Quick Reference Guide

## Creating a Training 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 either non-itemized or itemized transactions.
- For detailed information, please refer to the Reservations and Requests chapter of the Purchasing User Guide.

## GSA Policy

- All training orders require Accounting Classification, Funds Authorization, Manager and Training Coordinator approvals.
- 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 a 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 in the on the Delivery office address type page will receive email notification if receipt is not logged at the time the invoice is logged.

## Creating a Training Request

1. Select **Transactions** → **Purchasing** → **New** → **Training Request** from the Pegasys menu bar.
2. Enter **TR** into 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.
  - a. Leave the Security Org and Document Title fields blank.



# Pegasys Quick Reference Guide

Figure 1: New Training Request

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

## NEW TRAINING REQUEST

[New Training Request](#)

* Document Type	TR	Training Request
Document Number Format Prefix	<input type="text"/>	
Fiscal Year	2021	
AAC/DODAAC	<input type="text"/>	
Security Org	<input type="text"/>	
* Document Number	TR20210409000	<input type="button" value="Generate"/>
Title	<input type="text"/>	
Copy Document	<input checked="" type="radio"/> None <input type="radio"/> Copy From <input type="radio"/> Copy Forward	
File	<input type="button" value="Choose File"/> No file chosen	

[Go to top of Main Content](#)

4. Select **Finish**.
  - a. The user's default Security Org (which is GSA) will populate the field on the Header page.
5. Enter the requester's name in the **Authorized By** field in the General group box.
  - a. Reporting Acctg Period will default to current date when the form is Verified or Processed. The Date fields will default to the current date when the form is Verified or Processed.



# Pegasys Quick Reference Guide

### Figure 2: General Section for Training Request

**HEADER**

Header | Office Addresses | Suggested Vendors | Employees | Accounting Lines | Approval Routing | ...

---

**General**

Document Type: TR Training Request

Status: NEW

Document Number: TR20210409000

Title: \_\_\_\_\_

\* Authorized By: \_\_\_\_\_

Request Date: \_\_\_\_\_

Accounting Period: \_\_\_\_\_

Reporting Accounting Period: \_\_\_\_\_

Batch Number: \_\_\_\_\_

Document Classification: \_\_\_\_\_

Security Org: GSA

Suppress Printing

- In the Vendor Information group box, enter the vendor’s **Taxpayer Identification Number** and **address code** into the Code fields (if applicable). Enter any other relevant information.

### Figure 3: Vendor Information

**Vendor Information**

Vendor

Vendor: \_\_\_\_\_ ★ \_\_\_\_\_ ★ **More**

Address Name: \_\_\_\_\_

Customer Account: \_\_\_\_\_ ☆

- If applicable, specify the information from a contract or delivery order in the **Contracts** group box.

### Figure 4: Contracts

**Contracts**

Contracts Number: \_\_\_\_\_ ☆

Blanket Agreement Number: \_\_\_\_\_ ☆

Delivery Order Number: \_\_\_\_\_ ☆

Schedule Number: \_\_\_\_\_

Start Date: \_\_\_\_\_

End Date: \_\_\_\_\_

Procurement Plan Number: \_\_\_\_\_

Type of Action: \_\_\_\_\_

Priority: \_\_\_\_\_

Priority Rating: \_\_\_\_\_

Update Blanket Agreement

**View Contract / Blanket Agreement**

**Default Contract / Blanket Agreement To Lines**

- Select the **Suggested Vendors** tab.
  - Add a new line by selecting the **Add** button.



## Pegasys Quick Reference Guide

- b. Once a line has been created, the line may be modified by selecting the line on the **Suggested Vendors** page, selecting the **Suggested Vendors** tab and making the appropriate changes.

**Figure 5: Suggested Vendor Tab**



9. Enter or search for the vendor code in the **Code** field.

**Figure 6: Enter Suggested Vendor**

### Suggested Vendor

Item 1 of 1

– Vendor

Vendor  ★  ★

Address Name

10. Select the **Office Addresses** tab.
11. Select the **Add** button, to add a new Office Type.
12. Select the dropdown office type and select **Issue** for the Office Type for an **Issuing** office type.
13. Repeat step 12 for the Remit To Office types for a **Requesting** (procurement office) address information.
14. Repeat step 12 for any other appropriate **Office Type**.
  - a. A COTR address may also be added.
15. Select each office type and select the Office Address sub tab.



# Pegasys Quick Reference Guide

Figure 7: Office Addresses

OFFICE ADDRESSES

Header Office Addresses Suggested Vendors Employees Accounting Lines Approval Routing ...

Office Address Additional Contacts

1 - 3 of 3 results

Office Type	Office	Address	Primary Point Of Contact
<input type="radio"/> Issue		null null	
<input type="radio"/> Remit To		null null	
<input checked="" type="radio"/> COR		null null	

More Add Copy Remove

All << Page 1 of 1 >>

16. Enter the appropriate address code in the **Code** field.

Figure 8: Update Office Address

**OFFICE ADDRESS**

Office Address Additional Contacts

Item 3 of 3: 1 2 3

— General

Default Mailing Address Update Address Clear Address

\* Office Type COR

Code

AAC/DODAAC

Standardized Format Yes

Address Name

Address Line 1

City

State

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

17. Select the **Ellipsis** button, and select the **Course Information** tab.

18. Enter the **Course** and **Title** in the General group box.



# Pegasys Quick Reference Guide

19. If applicable, enter the **Program Office** and **Class Sequence**.

**Figure 9: Course Information**

**COURSE INFORMATION**

Header | Office Addresses | Suggested Vendors | Employees | Accounting Lines | **Course Information** | ...

---

- General

**Course** ☆

\* Course

\* Title

Program Office

Class Sequence

20. Enter the **Start Date** and **End Date** for the training course.

21. Enter a **Drop Date** for the course, if one exists.

**Figure 10: Course Dates**

## - Course Dates

Start Date

End Date

Drop Date

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

**Figure 11: Course Hours**

## - Course Hours

During Duty

Non-duty

Total

23. Enter the **Training Address**, or check the **Address Same As Vendor** box.



# Pegasys Quick Reference Guide

**Figure 12: Enter Training Address**

Training Address

Standardized Format Yes ▾

Address Name

Address Line 1

City

State  ☆

Address Same As Vendor

- 24. Enter the **Objective** and **Benefits** of the training course.
- 25. Select the **Employees** tab to enter employees who will attend the class.
- 26. Select **Add**.

**Figure 13: Add Employees**

**EMPLOYEES**

Header Office Addresses Suggested Vendors **Employees** Accounting Lines Approval Routing ⋮

No results

Code Last Name

Add Remove

- 27. Enter the appropriate employee information, and select **Search**.

**Figure 14: Employee Search Criteria**

**EMPLOYEE**

Search Criteria

Employee

First Name

Middle Name

Last Name

Search Cancel

- 28. Choose an employee from the **Employees Search** screen, and select **Select**.



# Pegasys Quick Reference Guide

Figure 15: Search Results Displayed

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

Select

29. Select the **Accounting Lines** tab.

30. Select **Add**.

Figure 16: Accounting Lines

**ACCOUNTING LINES**

Header | Office Addresses | Suggested Vendors | Employees | **Accounting Lines** | Approval Routing | ...

Accounting Line

1 - 1 of 1 results

<input type="checkbox"/>	Line Number	Amount	Transaction Type	Accounting Template	BBFY	EBFY	Fund
<input checked="" type="checkbox"/>	1	\$0.00					
<b>Total Header Funded Amc</b>		<b>\$0.00</b>					

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

31. Enter the **Start Date** and **End Date** in the **Period of Performance** box, if applicable.

Figure 17: Period of Performance

**Period of Performance**

Start Date

End Date

32. Enter the **Requested** field in the **Line Amounts** group box.





# Pegasys Quick Reference Guide

**Figure 18: Line Amounts**

— Line Amounts

	Current Amount
Requested	\$0.00
Applied Credit	\$0.00
Net Total	\$0.00

33. In the **Accounting Dimensions** section, enter the **Template**.
- 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.

**Figure 19: Accounting Dimensions**

34. Enter the referenced **RWA** or **IBAA Agreement** information in the Agreement box (PBS only).

**Figure 20: Agreement**

— Agreement

Agreement Number	<input type="text"/>	Agreement Line Number	<input type="text"/>
------------------	----------------------	-----------------------	----------------------

35. Fill in the **Contract Line Info** section, if the request is to be associated with an existing contract.



# Pegasys Quick Reference Guide

**Figure 21: Contracts Line Info**

Contracts Line Info

Contracts Number  ☆ View Contract / Blanket Agreement

Contracts Line Item Number  ☆

Sub-Contracts Line Item Number  ☆

Exhibit Contract Line Item Number  ☆

Delivery Order Number  ☆

Blanket Agreement Number  ☆

Blanket Agreement Line Item Number  ☆

Sub Blanket Agreement Line Item Number  ☆

Exhibit Blanket Agreement Line Item Number  ☆

36. Select the **Summary** tab to view or make changes to the header accounting lines.

**Figure 22: Summary Tab**

## SUMMARY

Header | Office Addresses | Suggested Vendors | Employees | Accounting Lines | **Summary** | ...

### HEADER ACCOUNTING LINES

1 - 1 of 1 results

<input type="checkbox"/>	Line Number	Total Requested Amount	Transaction Type	Accounting Template	ATA	AID	BPOA
<input checked="" type="checkbox"/>	1	<input type="text" value="\$0.00"/>					

37. Select the **Approval Routing** tab.

38. Select **Add User** or **Add Routing List**.

**Figure 23: Approval Routing**

## APPROVAL ROUTING

Header | Office Addresses | Suggested Vendors | Employees | Accounting Lines | **Approval Routing** | ...

No results

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

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



# Pegasys Quick Reference Guide

Figure 24: Search Criteria for User ID

**SEARCH**

Search Criteria

User ID

Name

40. Select the **Select** button to select the user or routing list you wish to add.

Figure 25: Select Principal ID

1 - 10 of 54 results

Principal ID

jamesdebusk

41. Select **Save** and then **Verify**.

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

42. Select the **Submit** button at the bottom of the page.

Figure 26: Submit Button

...

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