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.

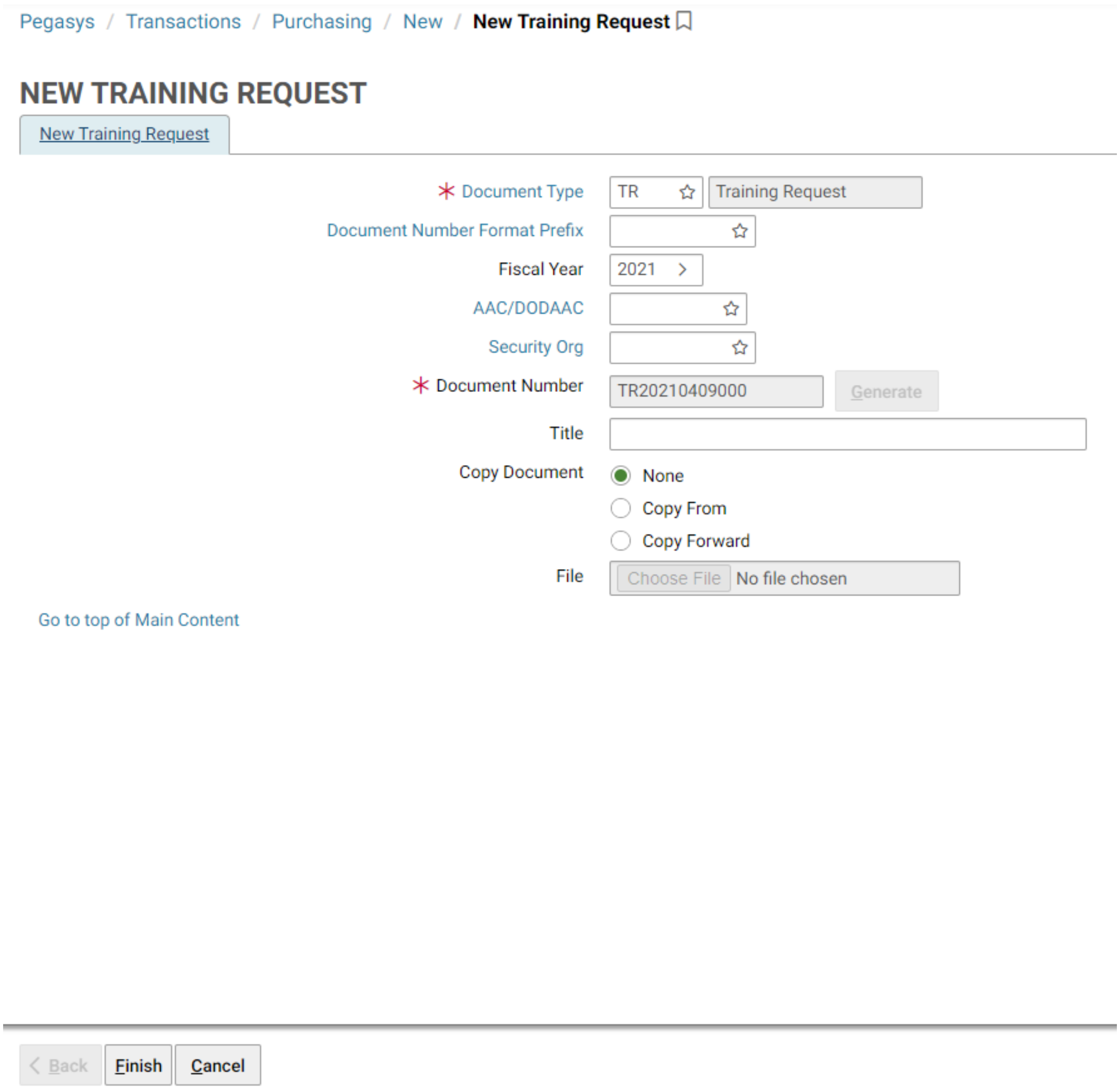
GSA Policy

- 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

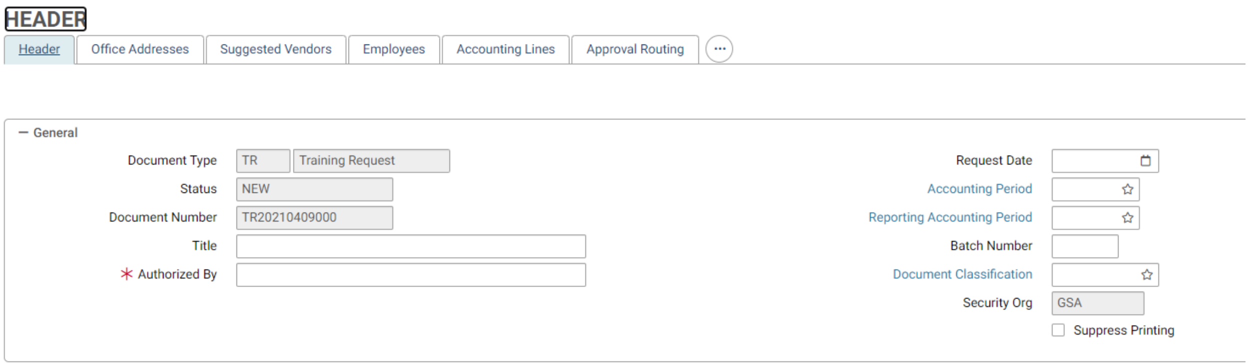
1. Select **Transactions** → **Purchasing** → **New** → **Training Request** from the Pegasys menu bar.
2. Enter **TR** into the **Document Type** field.
3. Select **Generate** Once the document number is generated, the [**Generate**] button will be disabled, prohibiting multiple selection attempts so that sequence numbers are not skipped.
    a. Leave the Security Org and Document Title fields blank.

Figure 1: New Training Request



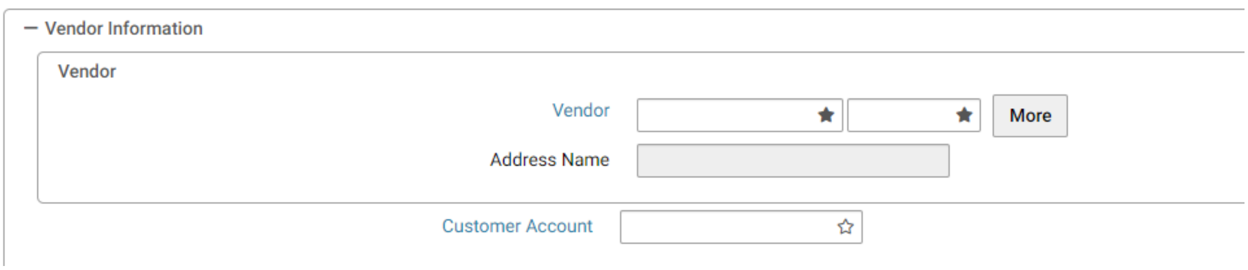
4. Select **Finish**.
    a. The user's default Security Org (which is GSA) will populate the field on the Header page.
5. Enter the requester's name in the **Authorized By** field in the General group box.
    a. Reporting Acctg Period will default to current date when the form is Verified or Processed.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

Figure 2: General Section for Training Request



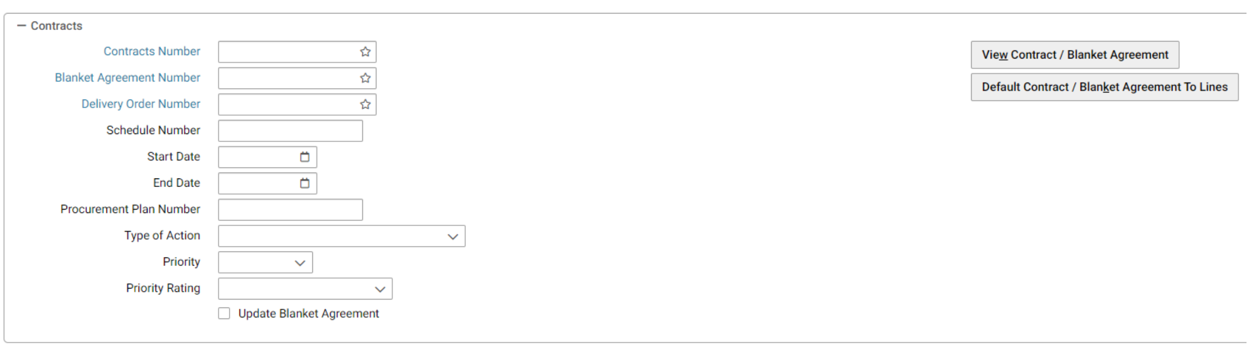
6. In the Vendor Information group box, enter the vendor's **Taxpayer Identification Number** and **address code** into the Code fields (if applicable).Enter any other relevant information.

Figure 3: Vendor Information



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

Figure 4: Contracts



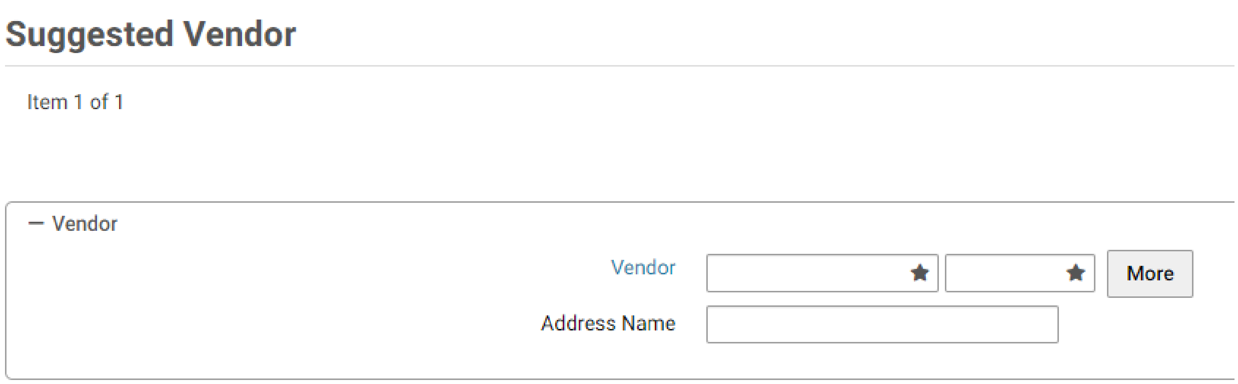
8. Select the **Suggested Vendors** tab.
   a. Add a new line by selecting the **Add** button.

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

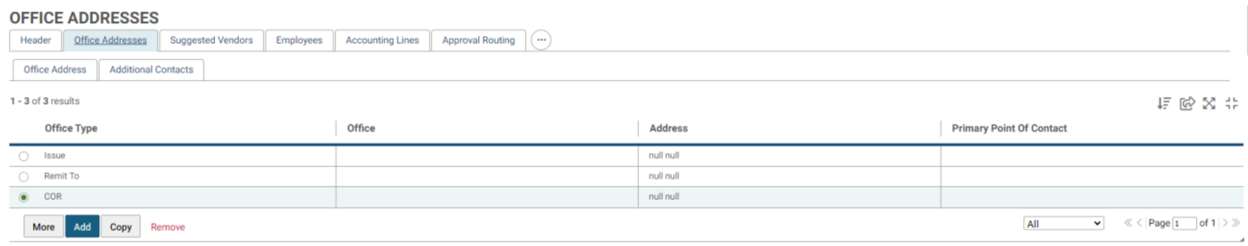
9. Enter or search for the vendor code in the **Code** field.

Figure 6: Enter Suggested Vendor



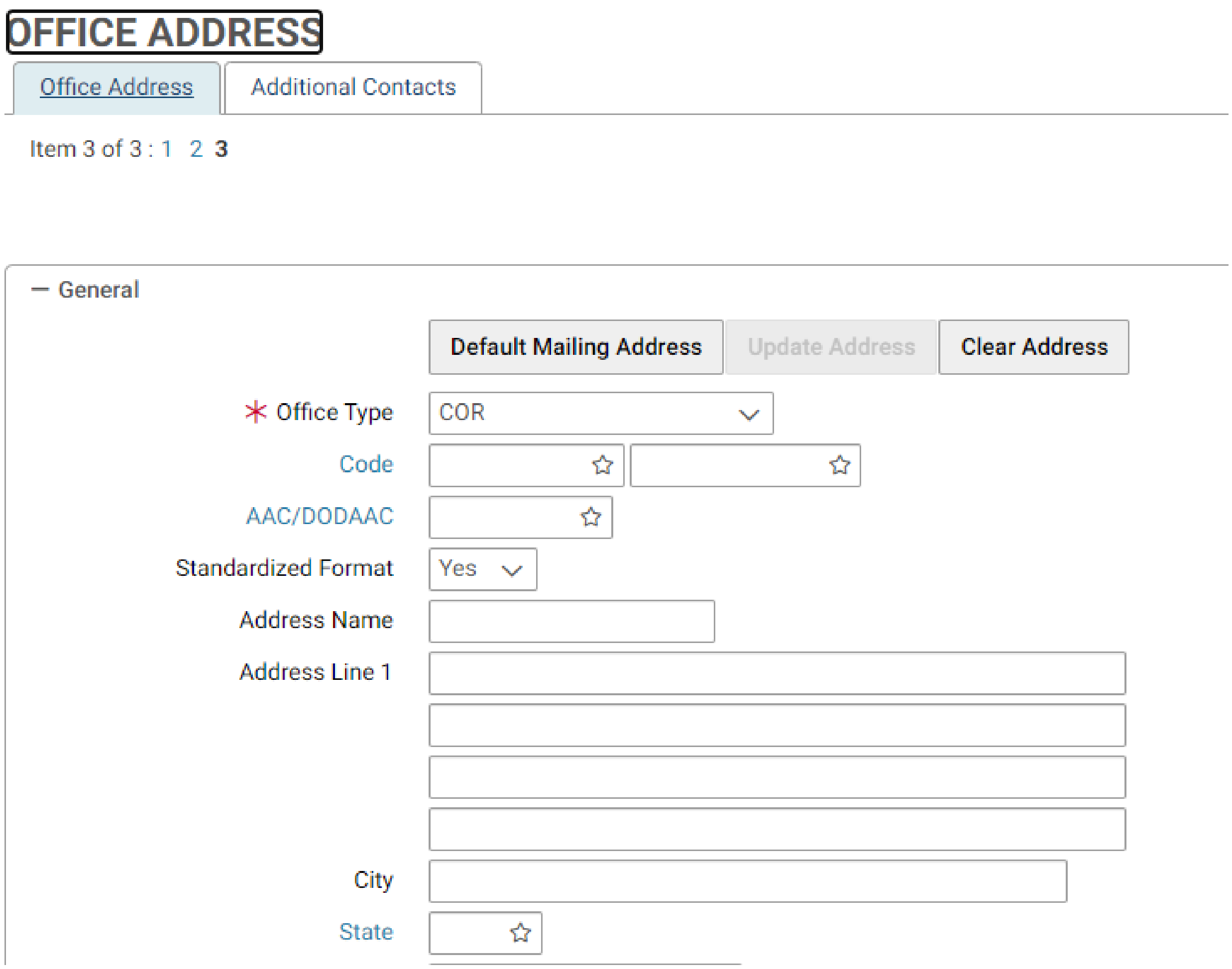
10. Select the **Office Addresses** tab.
11. Select the **Add** button, to add a new Office Type.
12. Select the dropdown office type and select **Issue** for the Office Type for an **Issuing** office type.
13. Repeat step 12 for the Remit To Office types for a **Requesting** (procurement office) address 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.

Figure 7: Office Addresses



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

Figure 8: Update Office Address



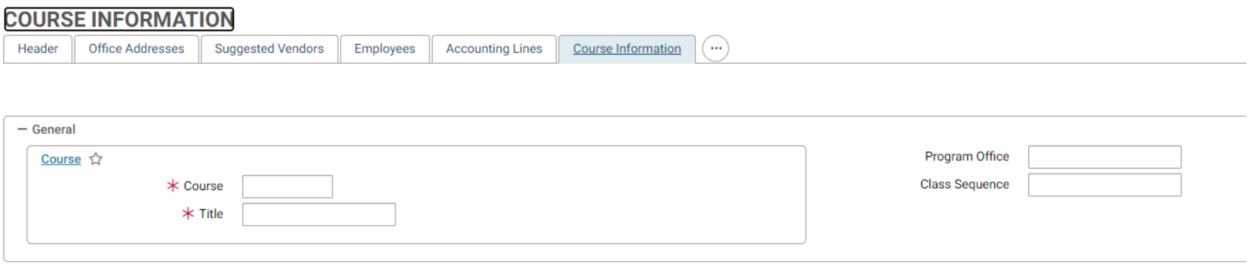
NOTE: Additional Contacts can be added to any entered addresses, and multiple secondary contacts can be entered for each office address.

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

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

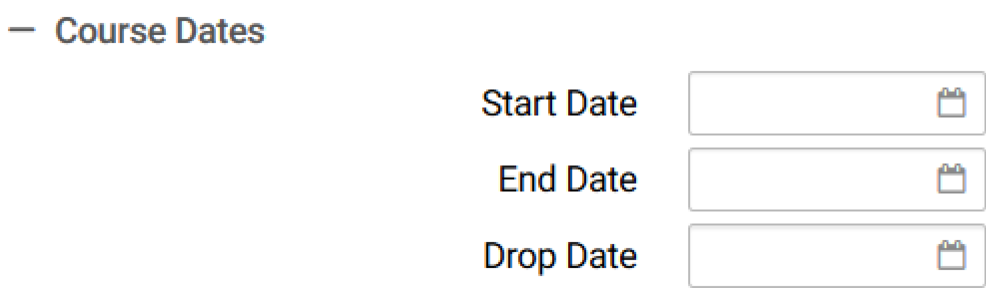
19. If applicable, enter the **Program Office** and **Class Sequence**.

Figure 9: Course Information



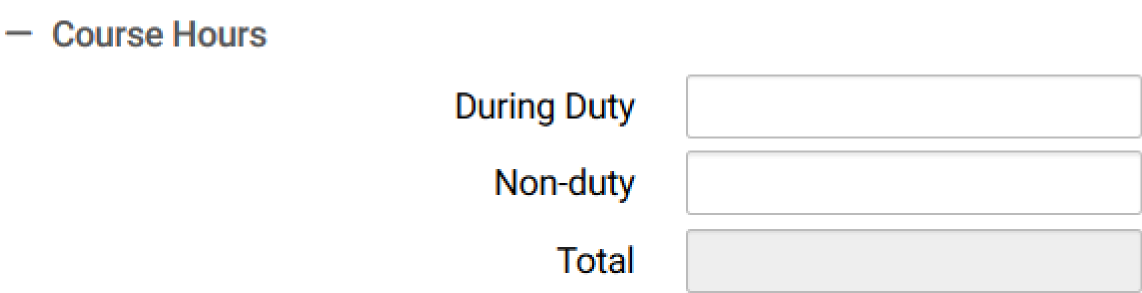
20. Enter the **Start Date** and **End Date** for the training course.
21. Enter a **Drop Date** for the course, if one exists.

Figure 10: Course Dates



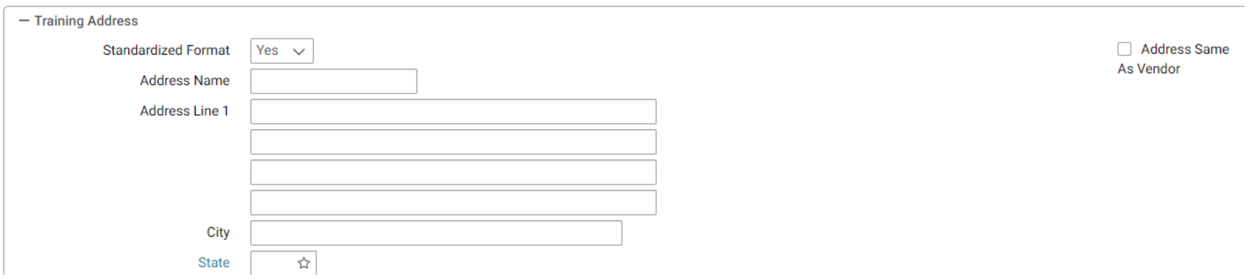
22. Enter the **Duty** and **Non-duty** hours in the **Course Hours** group box.

Figure 11: Course Hours



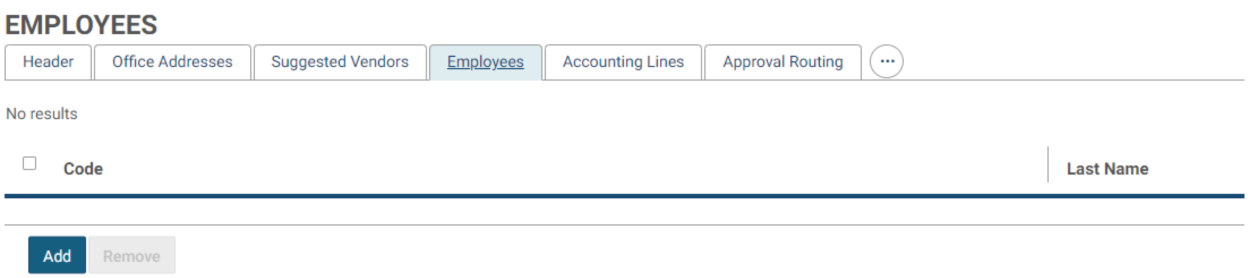
23. Enter the **Training Address**, or check the **Address Same As Vendor** box.

Figure 12: Enter Training Address



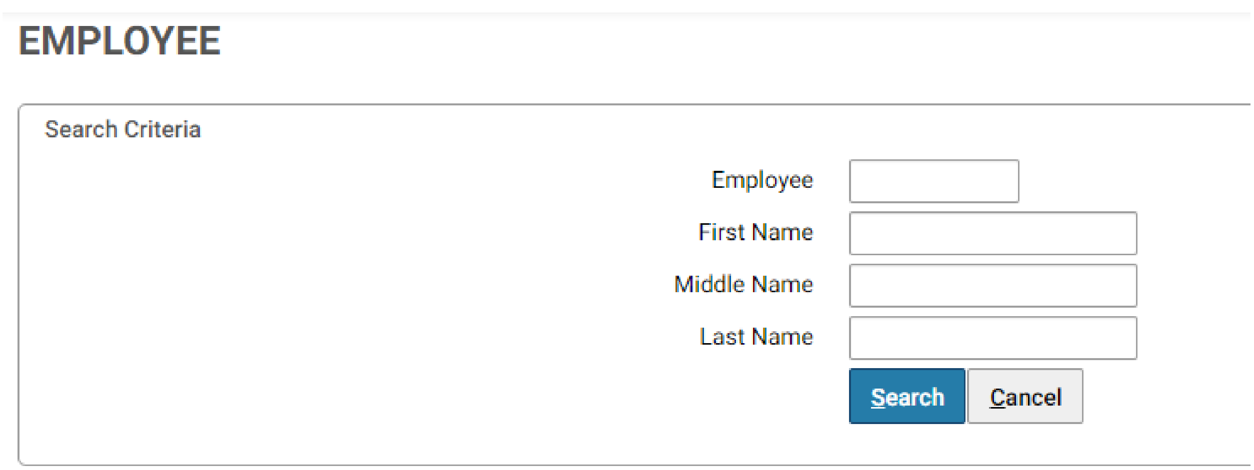
24. Enter the **Objective** and **Benefits** of the training course.
25. Select the **Employees** tab to enter employees who will attend the class.
26. Select **Add**.

Figure 13: Add Employees



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

Figure 14: Employee Search Criteria

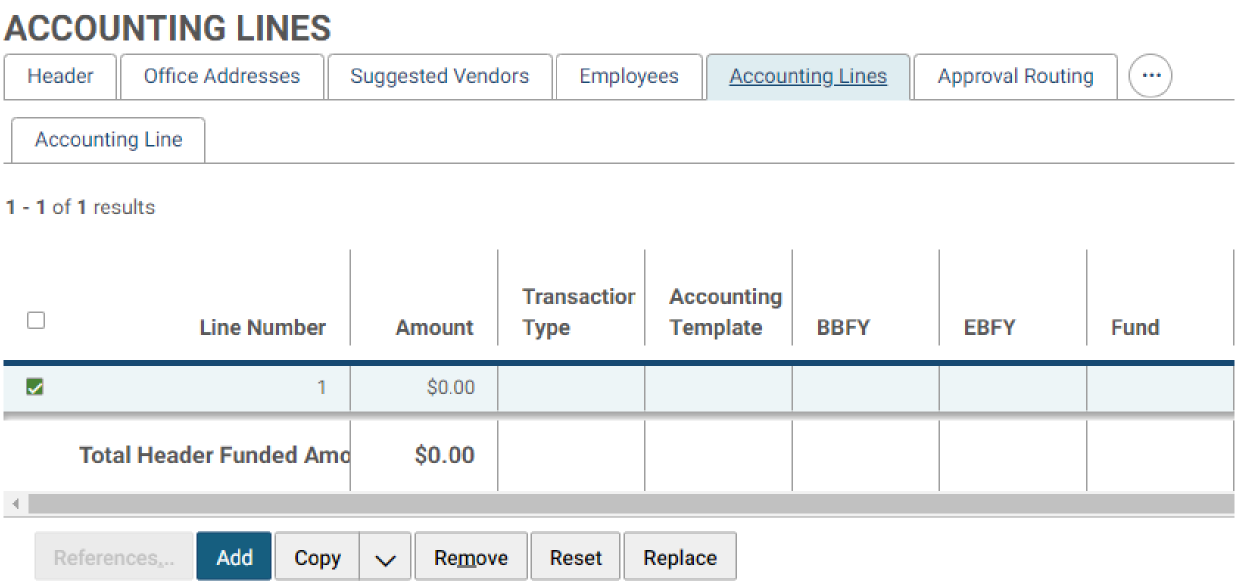


28. Choose an employee from the **Employees Search** screen, and select **Select**.

Figure 15: Search Results Displayed

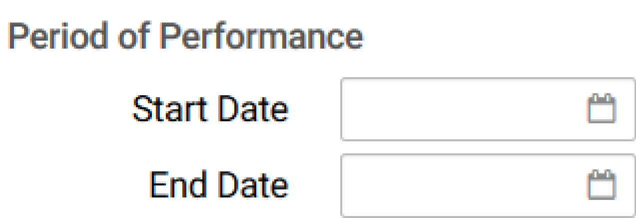
29. Select the **Accounting Lines** tab.
30. Select **Add**.

Figure 16: Accounting Lines



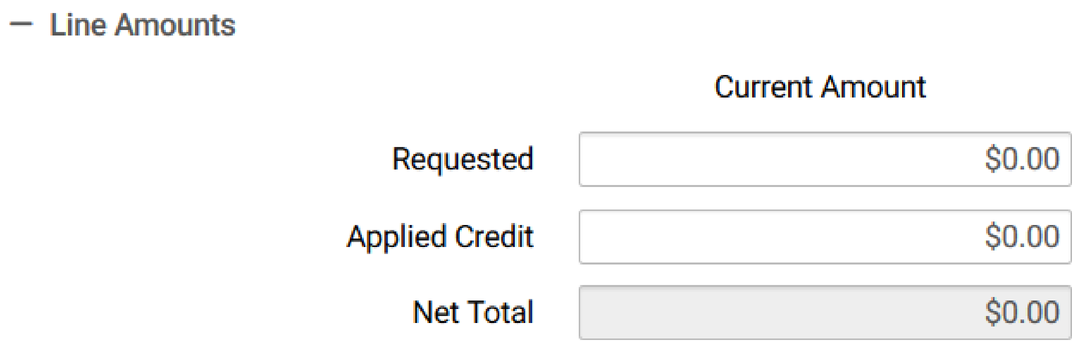
31. Enter the **Start Date** and **End Date** in the **Period of Performance** box, if applicable.

Figure 17: Period of Performance



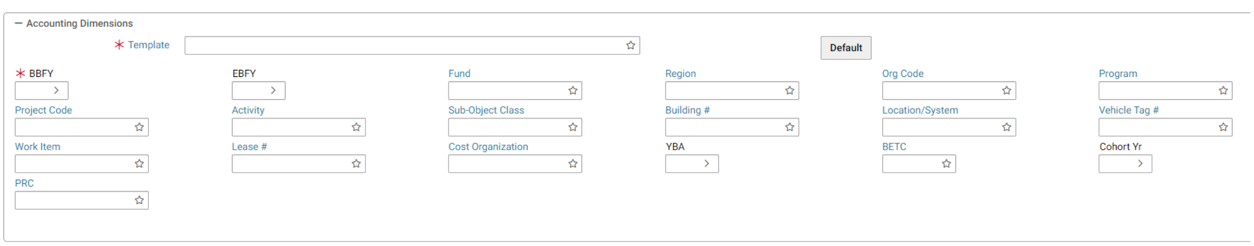
32. Enter the **Requested** field in the **Line Amounts** group box.

Figure 18: Line Amounts



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

Figure 19: Accounting Dimensions



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

Figure 20: Agreement

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

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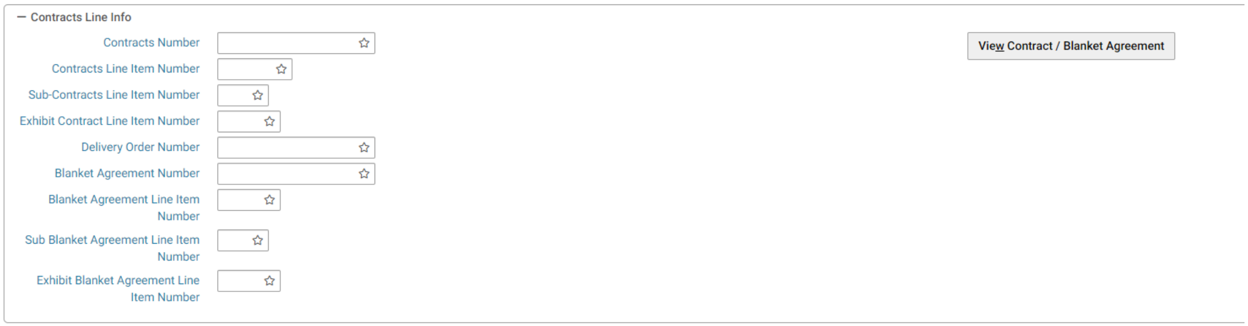
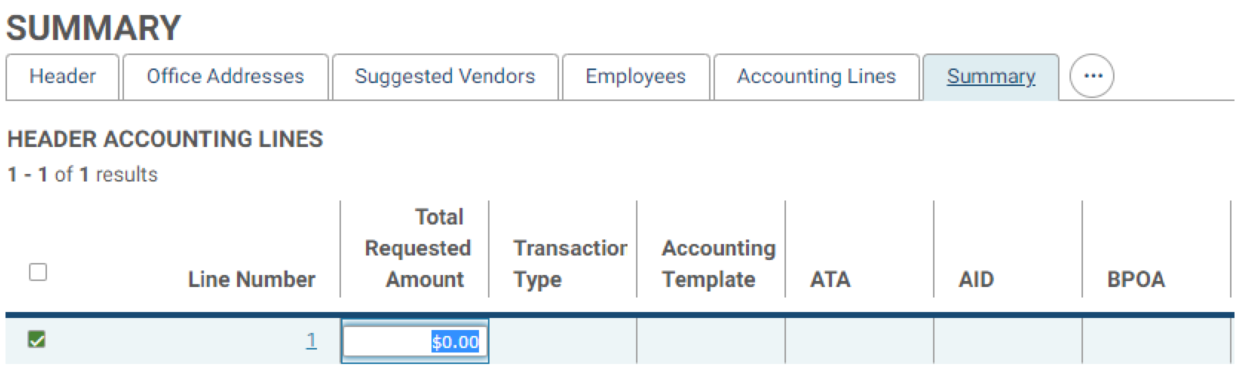
Figure 21: Contracts Line Info



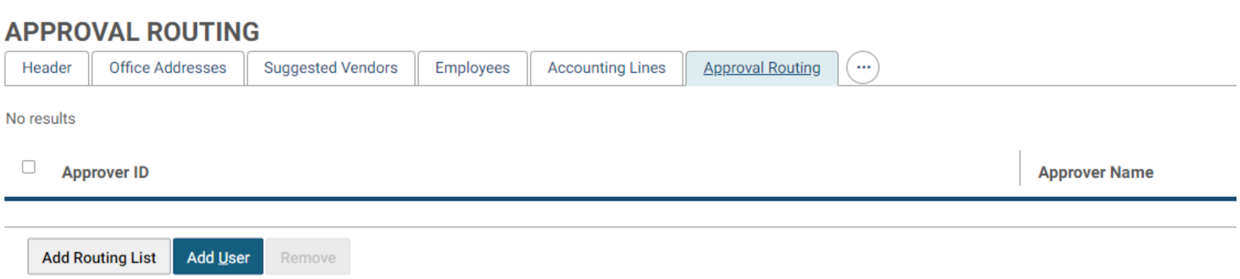
36. Select the **Summary** tab to view or make changes to the header accounting lines.

Figure 22: Summary Tab



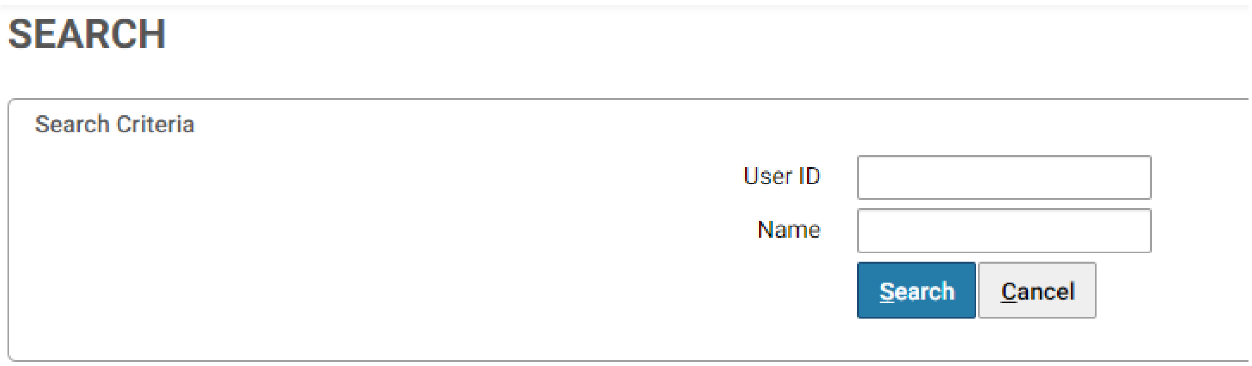
37. Select the **Approval Routing** tab.
38. Select **Add User** or **Add Routing List**.

Figure 23: Approval Routing



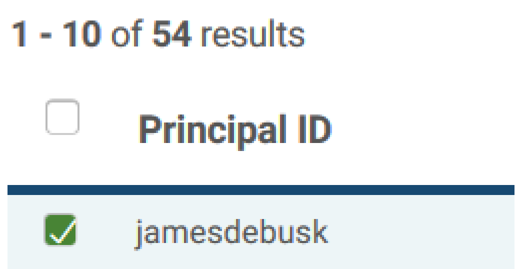
39. Enter the appropriate search criteria, and select **Search**.

Figure 24: Search Criteria for User ID



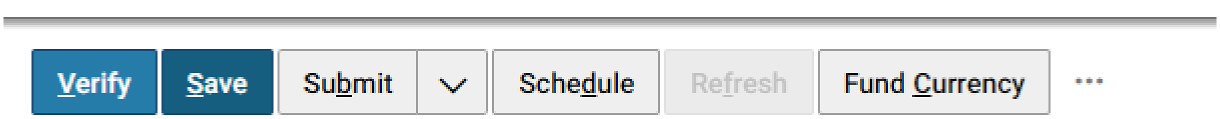
40. Select the **Select** button to select the user or routing list you wish to add.

Figure 25: Select Principal ID



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**.