Pegasys Quick Reference Guide

Review Form Workflow & Commenting

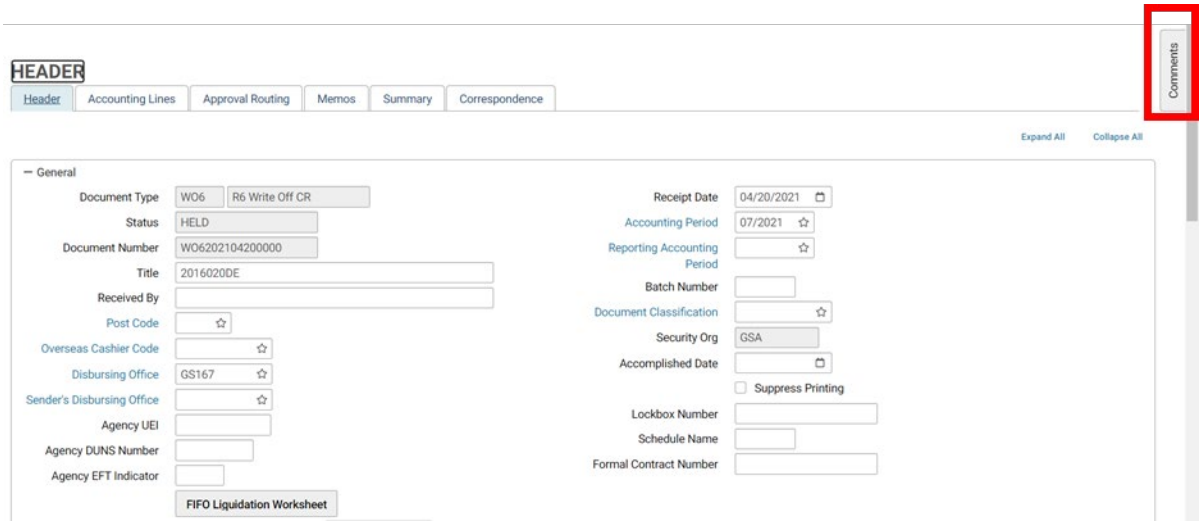
Review Form Workflow is used to review forms separate from ad-hoc routing and approvals. While a form is in a draft state (Held or Rejected status), a user can route it for review to one or more reviewers. Reviewers can then enter comments via the Comments panel and/or suggest changes to the actual form data via comments. Upon completion of reviews, the review originator will receive an email that indicates the reviewer has completed their review. Once the review form workflow is complete, the originator may continue processing the form. If the user elects to continue processing their form while a review form workflow is outstanding, the user will get an overrideable error and can choose whether to continue processing or wait for the review form workflow to be completed. The review form workflow will occur separately and completely prior to the form being submitted for approvals, signature, processing, and/or integration with external systems.

This functionality is beneficial for times when a user is unsure of what to enter in specific fields, or why a certain error may be causing the form to reject.

Initiate Review Form Workflow

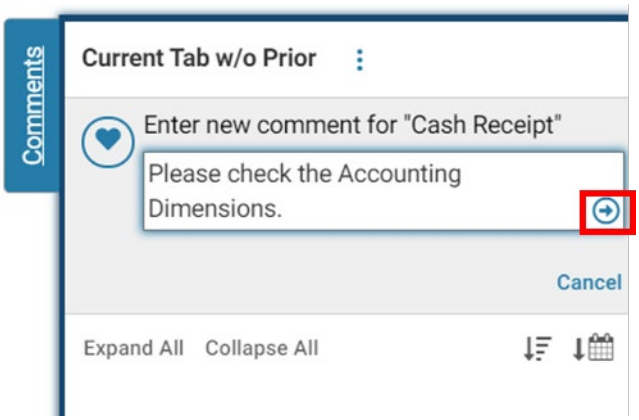
1. As the submitter of the form, if there are specific concerns you would like the Reviewer to see, select the **Comments** tab to add comments/questions. Steps 1-4 are optional.

Figure 1: Comments Tab



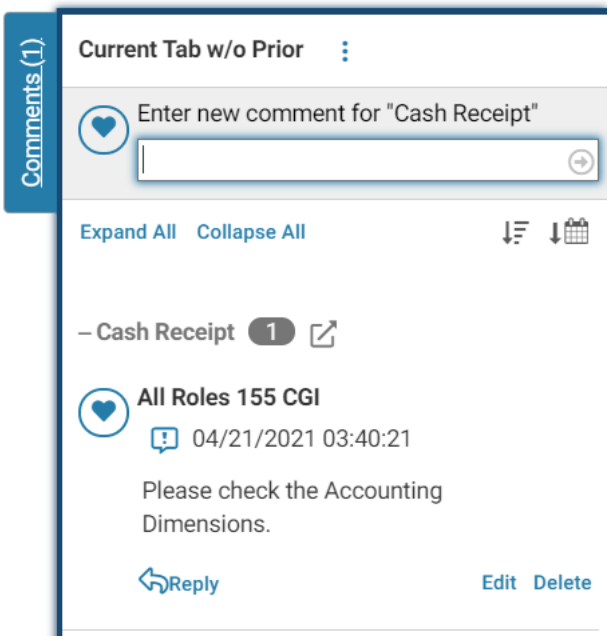
2. Add comments or questions.
3. Select the arrow to add the comment.

Figure 2: Add Comment



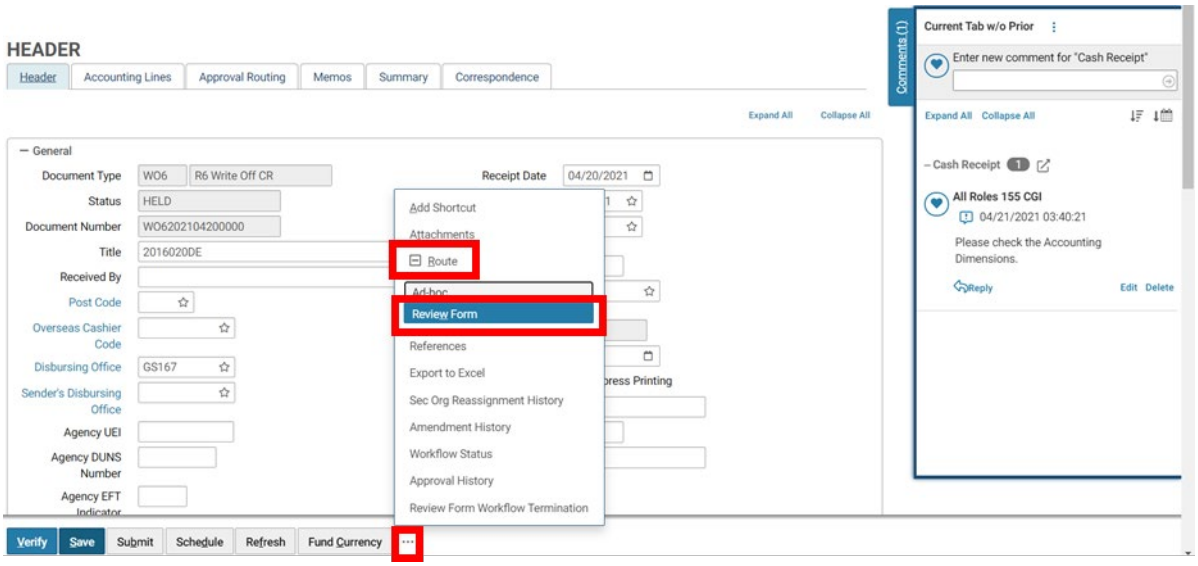
4. The comment is added successfully.

Figure 3: Comment Added



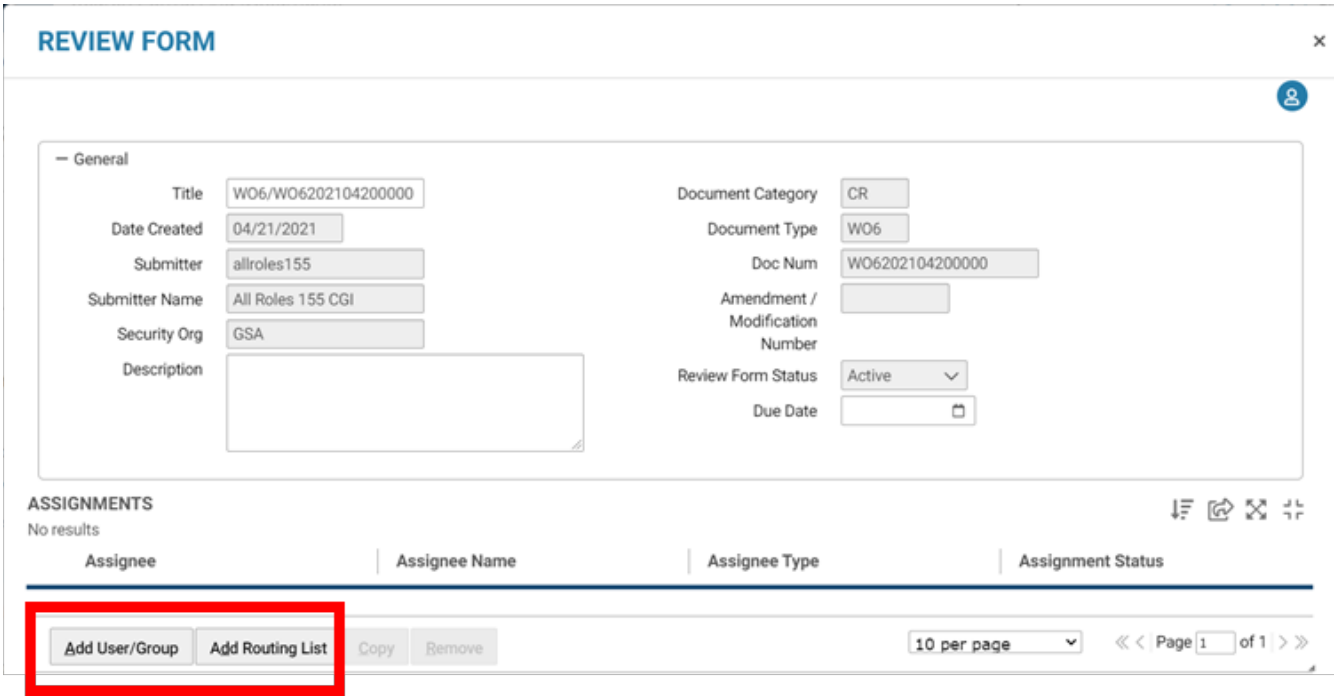
5. Select the ellipsis (…) then **Route → Review Form**.

Figure 4: Review Form Navigation



6. The Review Form modal is displayed.
7. Optionally, enter a Description and Due Date.

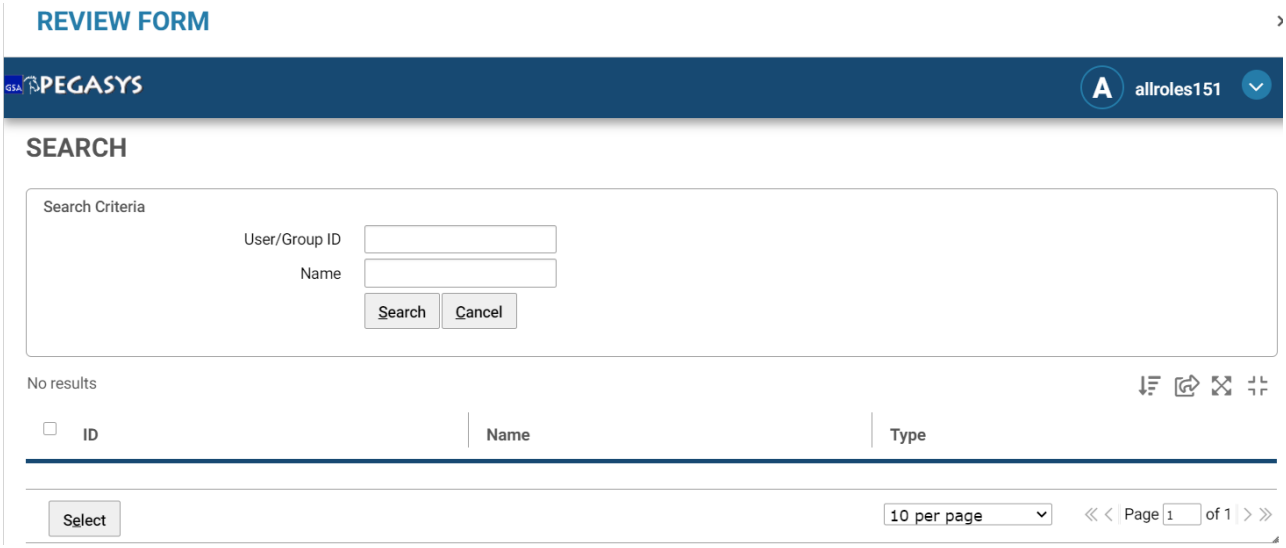
Figure 5: Review Form Modal



8. Select the **Add User/Group** or **Add Routing List** button.

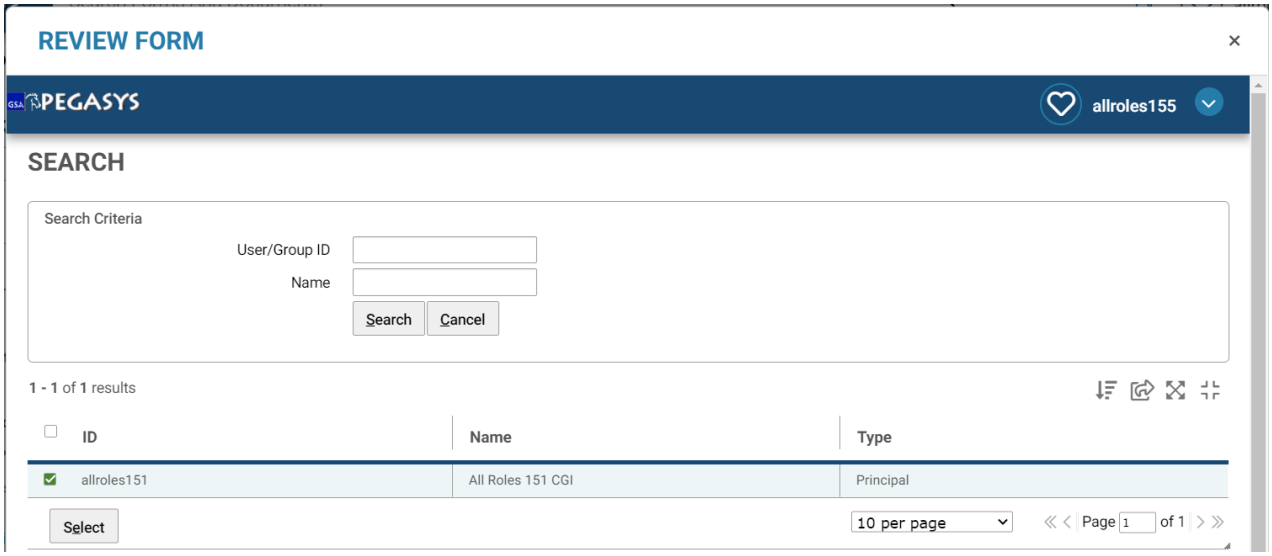
NOTE: Forms can be routed to one or more reviewers. For example, if more than one reviewer is needed, search for a Group ID via the **Add User/Group** button, or by a routing list code via the **Add Routing List** button.

Figure 6: Review Form Add User/Group Search Page



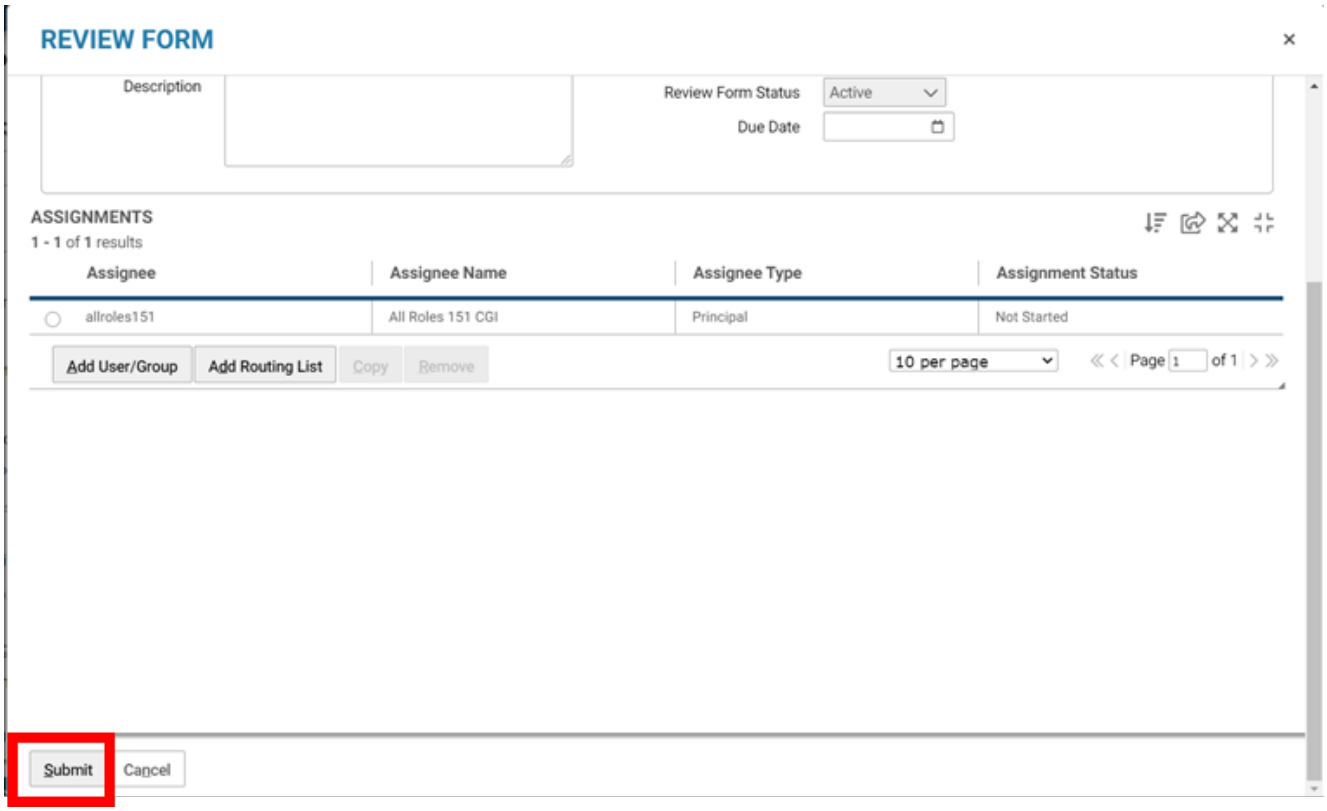
9. Search for and select the User or Group IDs.

Figure 7: Review Form Add User/Group Search Page Record Select



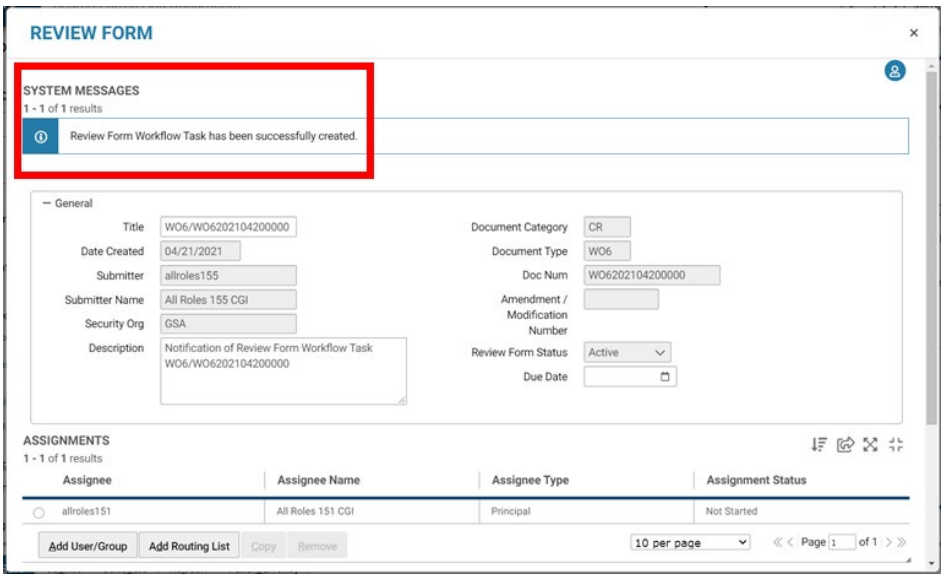
10. Select the **Select** button.
11. Select the **Submit** button once everything is populated.

Figure 8: Submit Review Form



12. "Review Form Workflow Task has been successfully created." message is displayed.

Figure 9: Task Successfully Created Message



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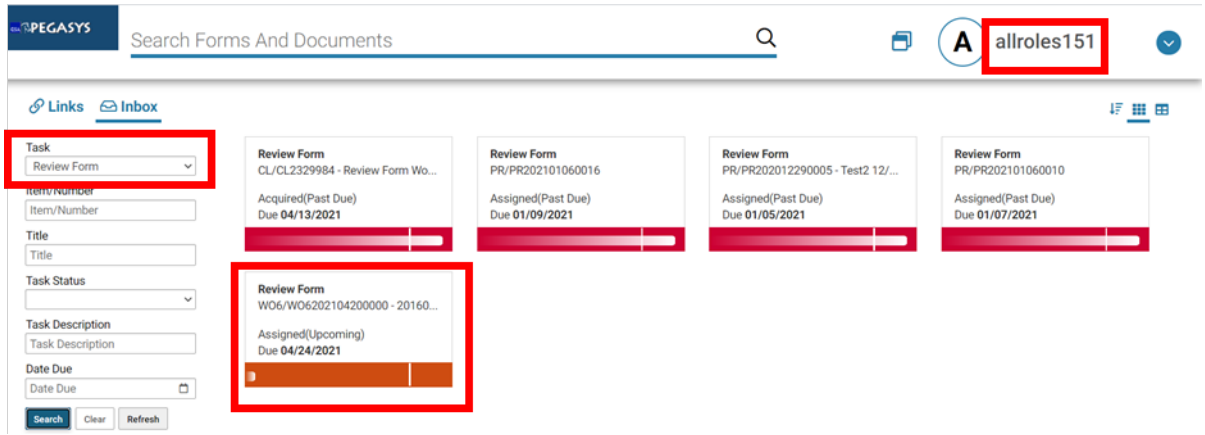
Review Form Workflow

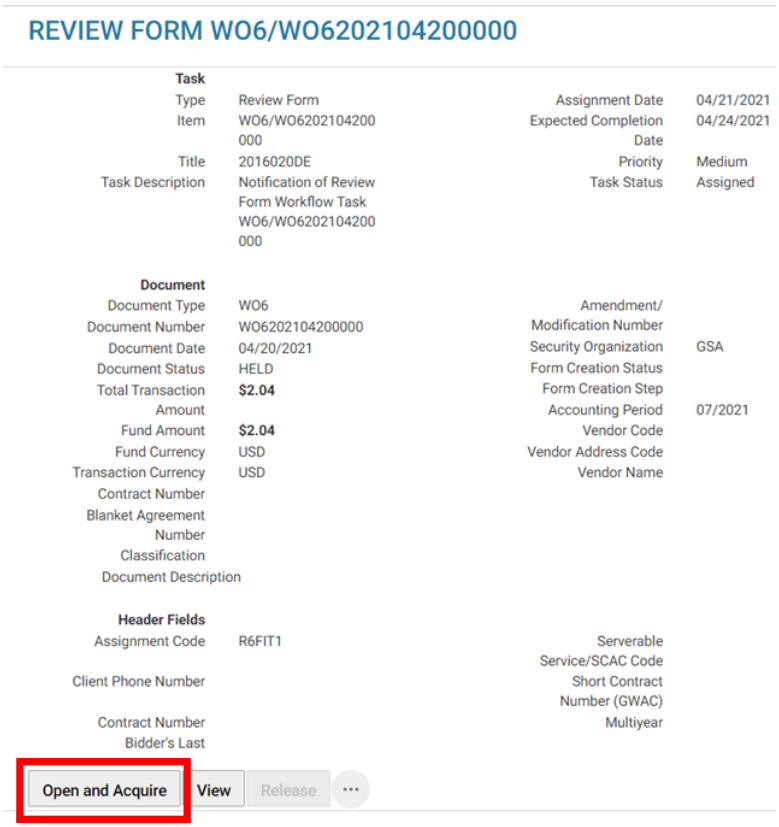
1. The Review Form task is routed to the reviewer(s) and an email is sent notifying the reviewer(s) of the task.

Figure 10: Task in Reviewer Inbox



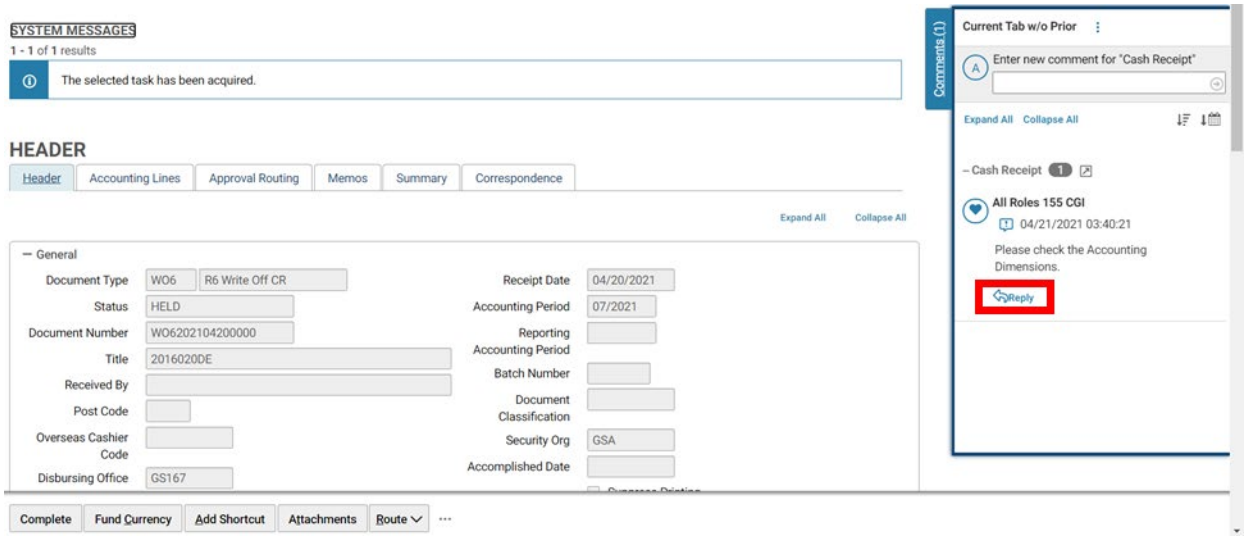
2. Select the Review Form task within the Inbox.

Figure 11: Review Form Workflow Task Assignment



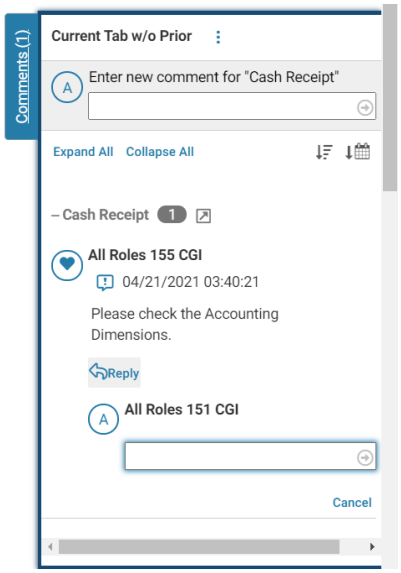
3. Select the **Open and Acquire** button.
4. The task containing the form opens. Review the form and any comments that already appear.

Figure 12: Review Form and Comment



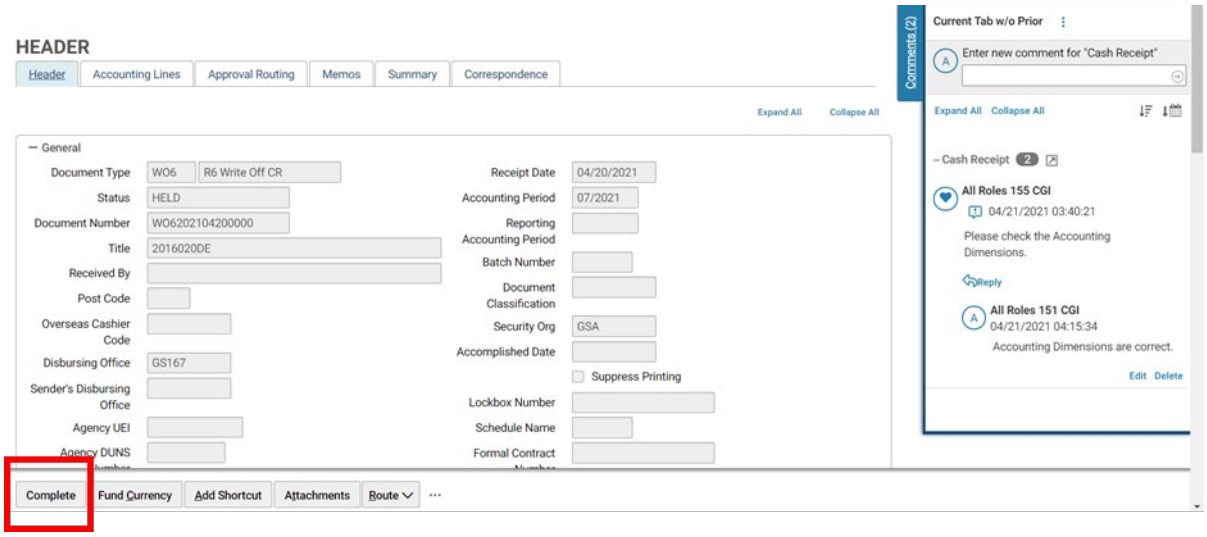
5. Select **Reply** to reply to the comment, if needed.

Figure 13: Reply to Comment



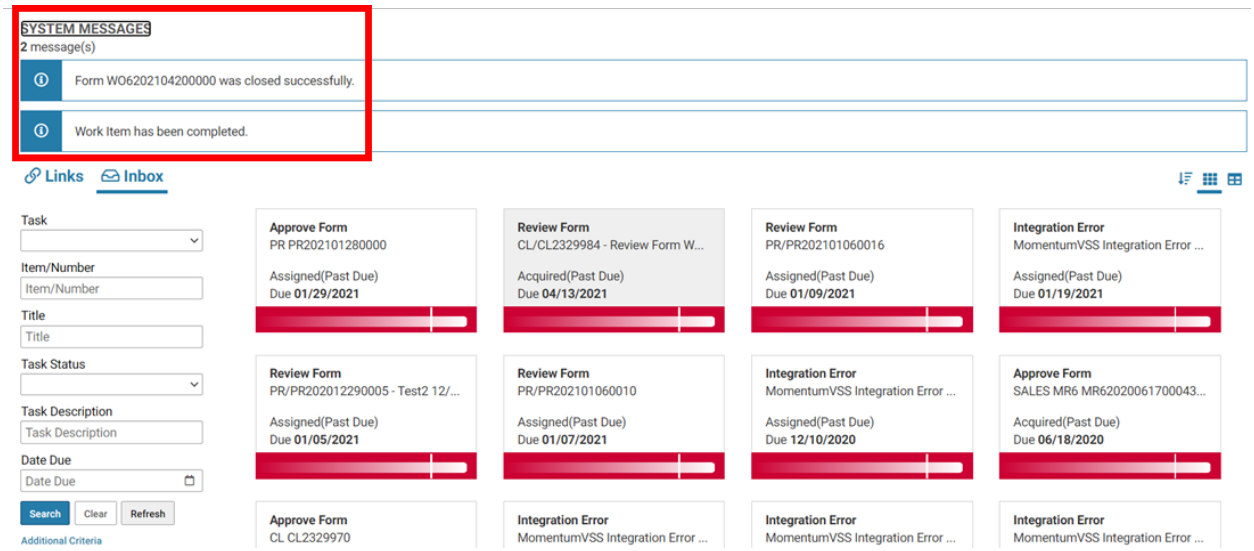
6. Enter a reply and select the arrow to add it.
7. Review the rest of the form. Add comments as needed to specific fields or for a specific tab.

Figure 14: Comment Reply



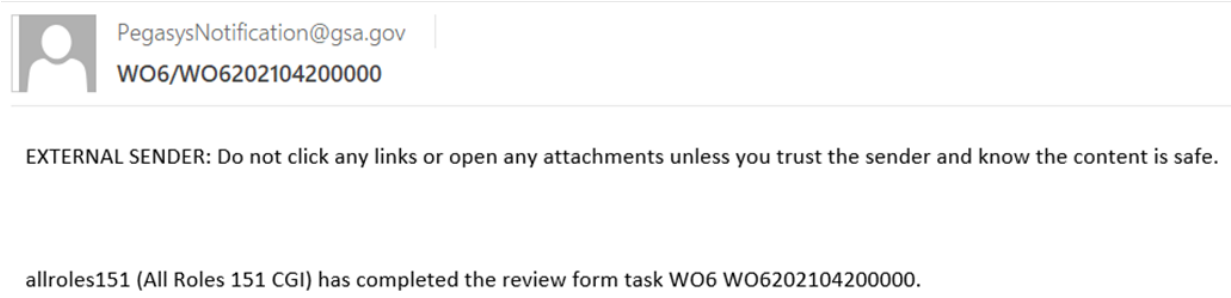
8. Once the reviewer is finished reviewing the form and addressing any specific issues or questions, select the **Complete** button. Completion messages are displayed.

Figure 15: Review Workflow Task Completion Messages



9. The initiator of the task receives an email stating the review form task has been completed by the reviewer.

Figure 16: Review Form Completion Email Confirmation


PegasysNotification@gsa.gov
WO6/WO6202104200000

EXTERNAL SENDER: Do not click any links or open any attachments unless you trust the sender and know the content is safe.

allroles151 (All Roles 151 CGI) has completed the review form task WO6 WO6202104200000.

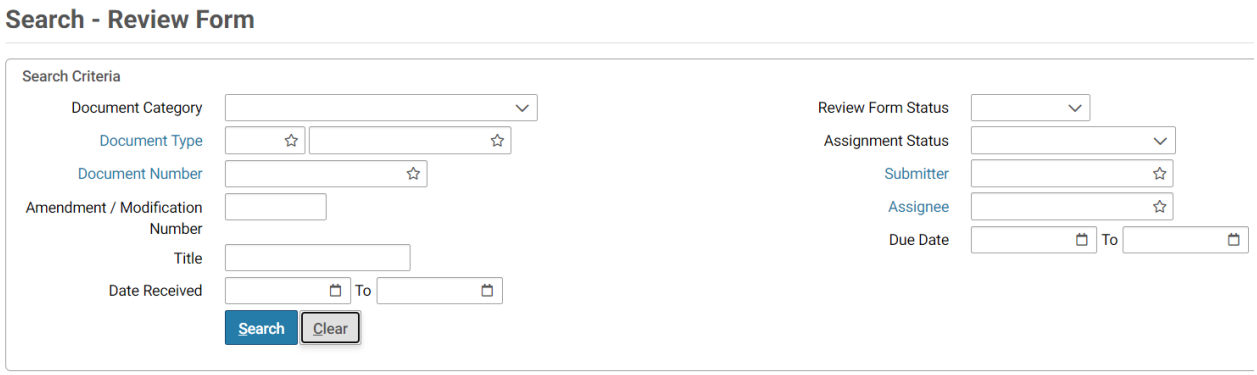
10. The review form workflow initiator can now review the comment(s), Accept/Reject any comments, reply again (if needed), or proceed with processing the form.
    NOTE: If there are additional questions or comments to send back to the reviewer again, add the necessary comments and initiate the Review Form task again by selecting the ellipsis (…) then **Route → Review Form**.
    NOTE: The Review Form workflow task does not have to be complete in order to process the form. If, for example, the initiator is able to resolve the issue before the reviewer is able to review and complete the task, the initiator can choose to continue with processing the document. The following warning will be thrown and will need to be overridden: There are outstanding comments with Pending Acceptance status or there is a Review Form workflow task, which has not been completed for the form.

Review Form Query

The Review Form Query provides users with the ability to query the details of a review form route. Selecting the Review Form task shows you if there is an open Review Form Workflow Task associated to a form. You are able to see if reviewers have completed the task, the task status, etc. If the task is not completed, you may optionally choose to terminate the assignment from this page.

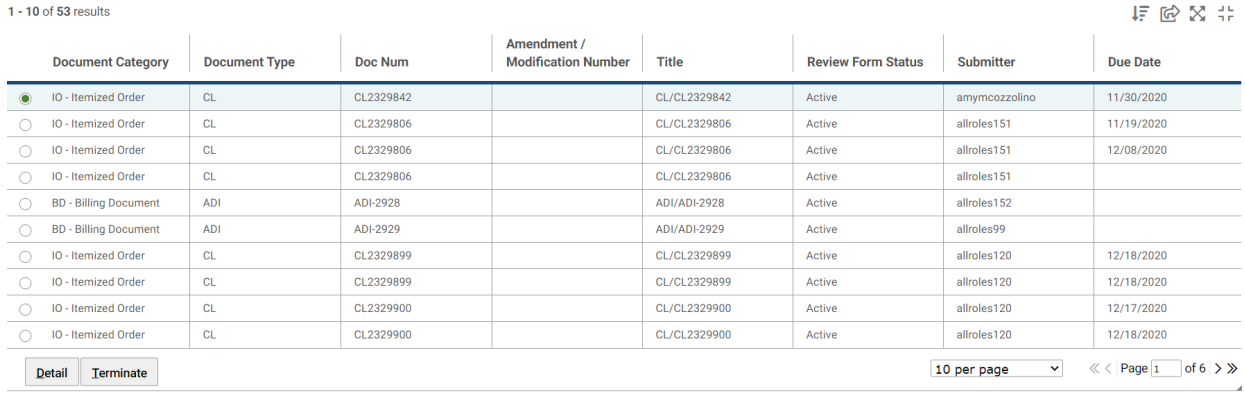
1. Navigate to Queries → Workflow → Review Form Query.

Figure 17: Review Form Query Search Page



2. Enter search criteria, such as the Document Number, and select the **Search** button.
3. Search results are displayed.

Figure 18: Review Form Query Search Results



Document Category	Document Type	Doc Num	Amendment / Modification Number	Title	Review Form Status	Submitter	Due Date
IO - Itemized Order	CL	CL2329842		CL/CL2329842	Active	amymcozzolino	11/30/2020
IO - Itemized Order	CL	CL2329806		CL/CL2329806	Active	allroles151	11/19/2020
IO - Itemized Order	CL	CL2329806		CL/CL2329806	Active	allroles151	12/08/2020
IO - Itemized Order	CL	CL2329806		CL/CL2329806	Active	allroles151	
BD - Billing Document	ADI	ADI-2928		ADI/ADI-2928	Active	allroles152	
BD - Billing Document	ADI	ADI-2929		ADI/ADI-2929	Active	allroles99	
IO - Itemized Order	CL	CL2329899		CL/CL2329899	Active	allroles120	12/18/2020
IO - Itemized Order	CL	CL2329899		CL/CL2329899	Active	allroles120	12/18/2020
IO - Itemized Order	CL	CL2329900		CL/CL2329900	Active	allroles120	12/17/2020
IO - Itemized Order	CL	CL2329900		CL/CL2329900	Active	allroles120	12/18/2020

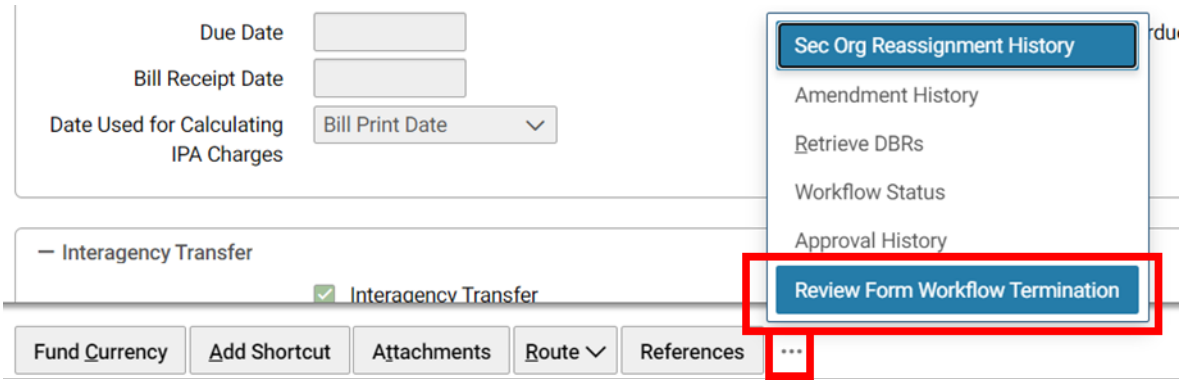
4. Select a record and select the **Detail** button to view details on the Review Form Workflow or select **Terminate** to terminate the task.

Review Form Workflow Termination

The Review Form Workflow Termination page provides users with the ability to terminate a review form workflow task. This option is accessible from within the form, while in view or correct mode.

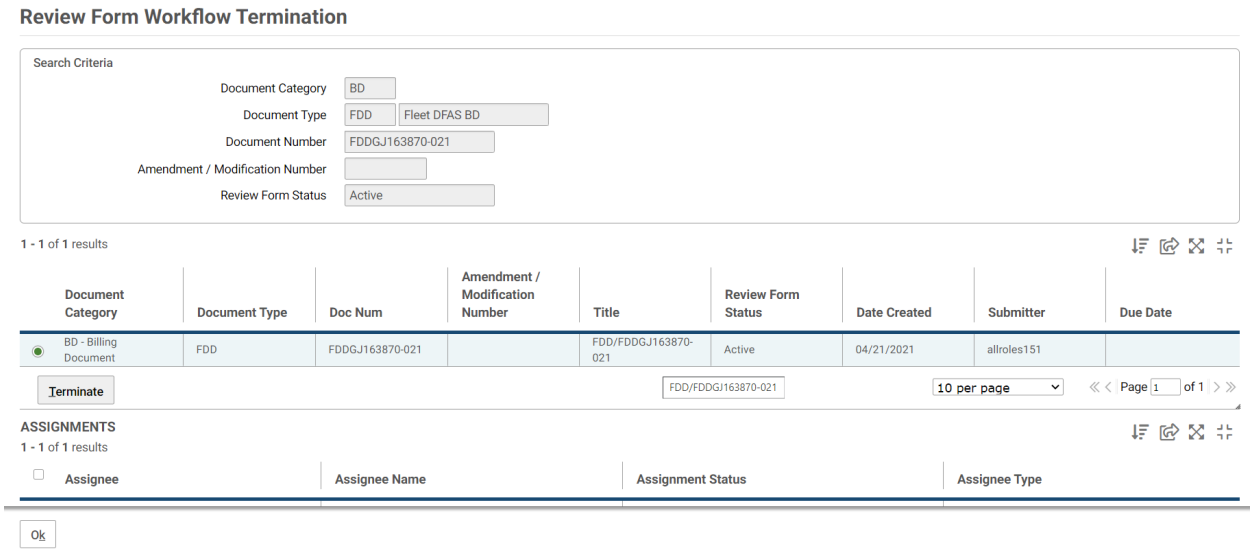
1. Open a form previously routed for review.
2. Select the ellipsis (…) then **Review Form Workflow Termination**.

Figure 19: Review Form Workflow Termination Navigation



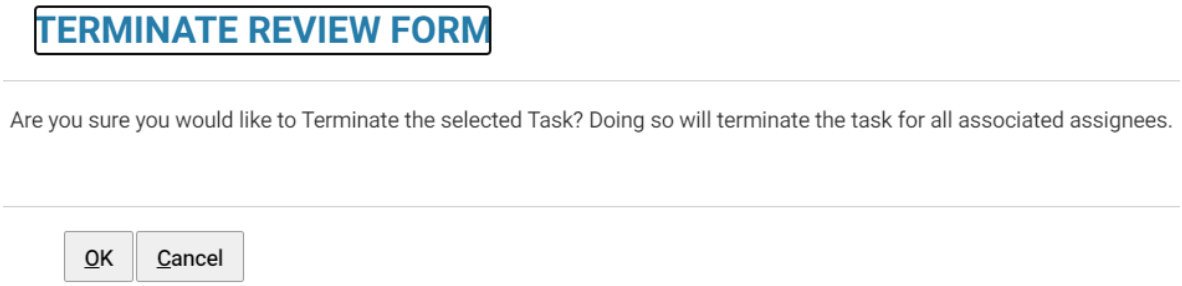
3. The Review Form Workflow Termination page is displayed.

Figure 20: Review Form Workflow Termination Page



4. To terminate the Review Form Workflow, select the record and select the **Terminate** button.
5. The Confirm Terminate Review Form message is displayed.

Figure 21: Confirm Terminate Review Form Message



6. Select **Ok**.
7. The Review Form Workflow task has been terminated.