



Pegasys Quick Reference Guide

Printing Purchasing & Budget Reports

Standard reports can be viewed online or routed to a printer. Standard GSA procurement forms, Organizational Status Reports and Fund Status L reports can be printed using the **Print** button, found on the Pegasys transaction, or via the Pegasys **Reports** menu. The forms will contain information that has been entered online in Pegasys.

- Fields with red asterisks (*) are mandatory for Pegasys processes but may not include all fields required by GSA policy.
- Form mappings of fields for standard GSA forms can be found in the Form Mappings Appendix of the Purchasing User Guide.
- For detailed information on reports, refer to the Reports chapter of the Purchasing User Guide.

How to Print a Purchasing Report

1. Select **Utilities** → **Reports** → **View Reports** from the Pegasys menu bar.

Figure 1: View Reports Page

Pegasys / Utilities / Reports / View Reports

View Reports

Reports

- + Pegasys Reports Portal
- + Accounts Receivable
- + Auto Disbursements
- + Budget Execution
- + Credit Card
- + External Reporting
- + General Ledger

Run Subscribe **View Current Subscriptions**

Report Status
No results

Description	Report Status	Saved Output Format	Report Start	Report End	Report Expiration	User ID	Saved Output Access
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2. Choose the report you wish to run.
 - a. Ex: **Purchasing** → **Finance Reports** → **Construction Holdbacks**.



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Figure 2: Reports Section Within Reports Page

Pegasys / Utilities / Reports / View Reports

View Reports

Reports

- + External Reporting
- + General Ledger
- + General System
- + Planning
- Purchasing
 - Finance Reports
 - Construction Holdbacks

Run Subscribe **View Current Subscriptions**

Report Status
No results

Description	Report Status	Saved Output Format	Report Start	Report End	Report Expiration	User ID	Saved Output Access
-------------	---------------	---------------------	--------------	------------	-------------------	---------	---------------------

3. Select the **Run** button.
4. In the new window, enter the parameters of your report. For specific parameter information, refer to the Reports chapter of the Purchasing User Guide.
5. In the **Options** section, verify that PDF is selected for the Saved Output Format.
6. Select **Run** to generate the report/form.
 - a. An announcement will appear at the top of the window that says “The report has been successfully submitted.”



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Figure 3: Construction Holdbacks Page

Construction Holdbacks

Parameters

FromDate

ToDate

OrderNumber

ContractNumber

HBDocNumber

VendorCode

HBPymtDocNum

Options

Dynamic Web Viewer

Saved Output Format

* Receive Email

Cancellation Notification Description

Saved Output Access

Security Organization

[Go to top of page](#)

Run

7. Select the X in the top right corner of the window to close the window.
8. At this point, you will be left with one open window titled View Reports. In this window, select on **Refresh**, and the report you ran should show up in the **Report Status** table. Once the Report Status says **Complete**, you will be able to view the report.

Figure 4: Report Status Table

Description	Report Status	Saved Output Format	Report Start
	Pending	PDF	02/15/2018 13:44:51

Refresh **Parameters** **Output** **Delete** **Route** **Add Shortcut** ...

9. To view your report, select the report you want to view and select **Output**.

Figure 5: Selected Report

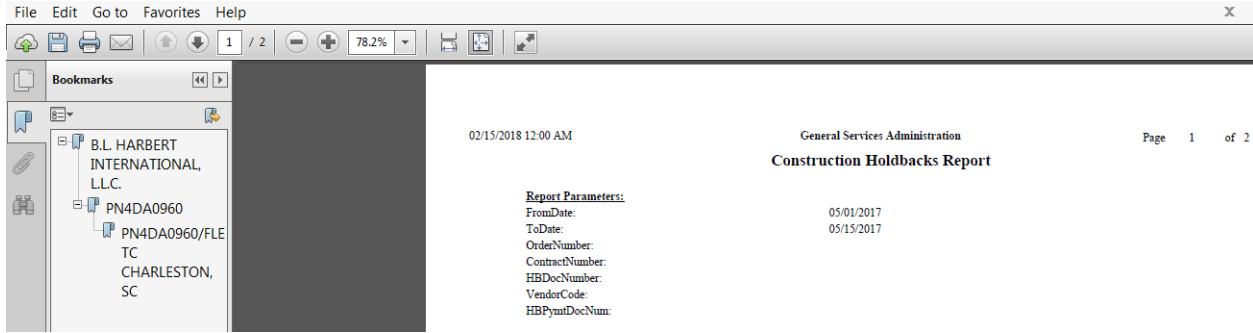
Description	Report Status ▲	Saved Output Format
	Complete	PDF



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10. A new box will appear showing your report.

Figure 6: Opened Report



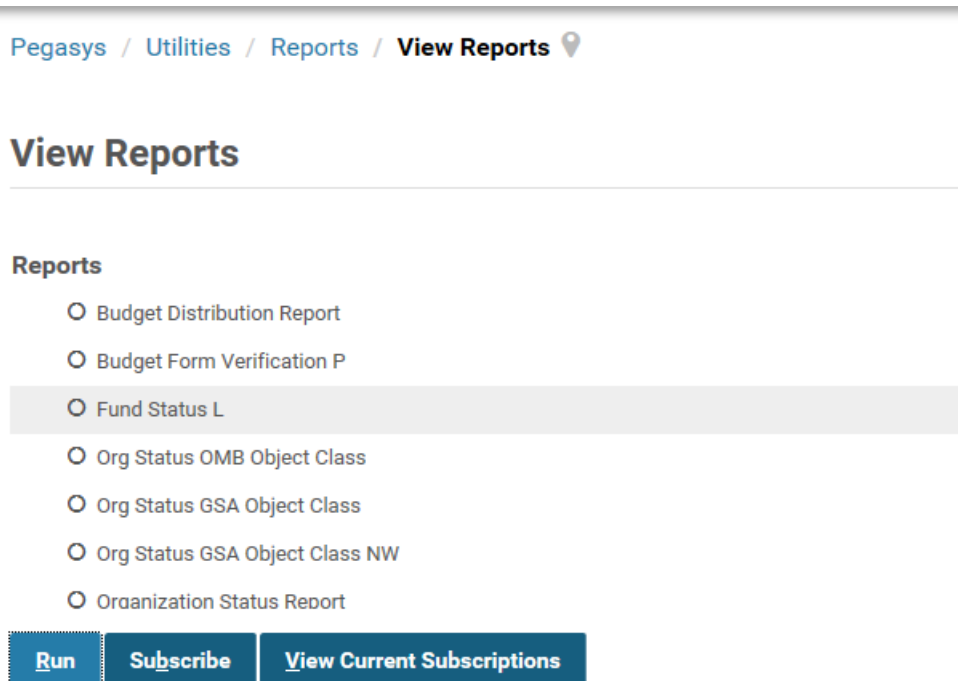
11. Choose **File** → **Print** to print the document.

12. Choose **File** → **Save As** to save the document.

How to Print a Budget Report

1. Select **Utilities** → **Reports** → **View Reports** from the Pegasys menu bar.
2. Choose the report you wish to run under Budget Execution.
 - a. Ex: **Budget Execution** → **Reports** → **Fund Status L**.

Figure 7: View Reports Page (Continued)





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3. Select on the **Run** button.
4. In the new window, enter the parameters of your report. For specific parameter information, refer to the Reports chapter of the Purchasing User Guide.

Figure 8: Fund Status L Page

Fund Status L

— Parameters

* BBFY	<input type="text"/>
EBFY	<input type="text"/>
* Fund Code	<input type="text"/>
Level 2 Dimension	<input type="text" value="v"/>
Level 2 Value	<input type="text"/>
Level 3 Dimension	<input type="text" value="v"/>
Level 3 Value	<input type="text"/>
Level 4 Dimension	<input type="text" value="v"/>
Level 4 Value	<input type="text"/>
Level 5 Dimension	<input type="text" value="v"/>
Level 5 Value	<input type="text"/>
Level 6 Dimension	<input type="text" value="v"/>
Level 6 Value	<input type="text"/>
Level 7 Dimension	<input type="text" value="v"/>
Level 7 Value	<input type="text"/>

Run

5. In the **Options** section, verify that PDF is selected for the Saved Output Format.
6. Select **Run** to generate the report/form.
 - a. An announcement will appear at the top of the window, stating “The report has been successfully submitted.”
7. Select the X in the top right corner of the window to close the window.



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- At this point, you will be left with one open window titled View Reports. In this window, select on **Refresh**, and the report you just ran should show up in the **Report Status** table. Once the Report Status says **Complete**, you will be able to view the report.

Figure 9: Report Status

Description	Report Status	Saved Output Format	Report Start ▼
	Pending	PDF	02/15/2018 16:00:14

[Refresh](#)
[Parameters](#)
[Output](#)
[Delete](#)
[Route](#)
[Add Shortcut](#)
...

- Select the report you want to view, and select the **Output** button.

Figure 10: Output Button

Description	Report Status	Saved Output Format	Report Start ▼	Report End
	Complete	PDF	02/15/2018 16:00:14	02/15/2018 16:05:40

[Refresh](#)
[Parameters](#)
[Output](#)
[Delete](#)
[Route](#)
[Add Shortcut](#)
...

- A new box will appear showing your report.

Figure 11: Opened Report (Continued)

02/15/2018 12:00 AM

General Services Administration
Fund Status Report(Obligation-based)
 Fund: 2017 285F Name: Acquisition Services Fund - Flow Through

Page 1 of 3
 Through: May/2017
 Actg Pd: 08/2017

Report Parameters:
 BBFY: 2017
 EBFY:
 Fund Code: 285F
 Level 2 Dimension:
 Level 2 Value:
 Level 3 Dimension:
 Level 3 Value:
 Level 4 Dimension:
 Level 4 Value:
 Level 5 Dimension:
 Level 5 Value:
 Level 6 Dimension:
 Level 6 Value:
 Level 7 Dimension:
 Level 7 Value:

- Choose **File** → **Print** to print the document.
- Choose **File** → **Save** to save the document.