



# Pegasys User Certification - User Guide

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# Pegasys User Certification - User Guide

## 1. Overview

The objective of the Pegasys User Certification User Guide is to provide step-by-step instructions on how to perform certification tasks in the GSA Pegasys application. User accounts have to be recertified every quarter by managers based on USDA's security policy. The Pegasys User Certification feature provides the capability for managers to log into Pegasys during the month-long certification period to re-certify their employees' access. Uncertified employees will have their accounts deactivated at the end of the certification period. Account holders are provided a read-only capability to check on their own certification status in Pegasys, allowing them to communicate with their managers if specific actions have to be taken during the certification period.

For new Pegasys users, please refer to Section 2 for steps on how to log into Pegasys. If you are already familiar with Pegasys login, you may skip Section 2. The rest of the guide provides instructions on use of the 2 capabilities: a) the User View that is available by all users of Pegasys, and b) the Manager View that is available only to managers to perform the certification tasks.

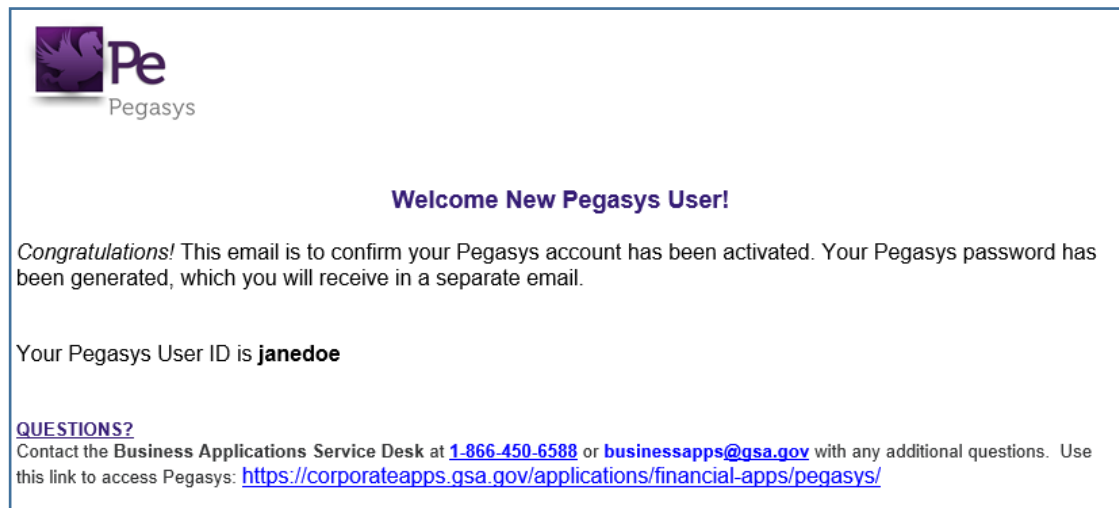


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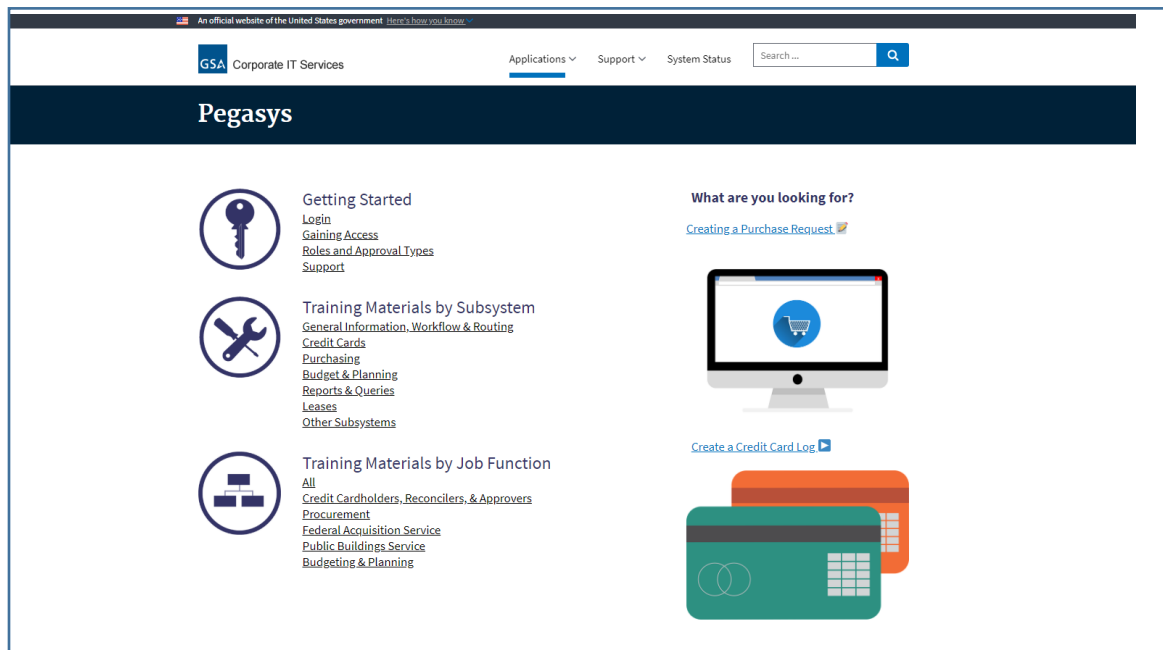
## 2. Login process for New Managers or Users

If you are new to Pegasys, this section explains the login process.

1. When the Security administrator creates your Pegasys account, you will receive an email similar to the one below.



2. Click <https://corporateapps.gsa.gov/applications/financial-apps/pegasys/> in the email to get to this page below.



3. Click Login.



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4. If this is the first time that you log in to Pegasys, you will see the *Login and Password Prompt* screen and the *Login Confirmation* screen. (These 2 screens will not appear during subsequent logins because Single sign-on would have been established for your account by then.)

### *Login and Password Prompt* screen

### *Login Confirmation* screen

5. Once you click OK, you will see the Start page in Pegasys.



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**PEGASYS**

Search Forms And Documents

1 server message(s)

Your last successful login was 05/08/2020 10:00:14

**Links** **Inbox**

Task

Item

Task Status

Task Description

Date Due

Search

Clear

Refresh

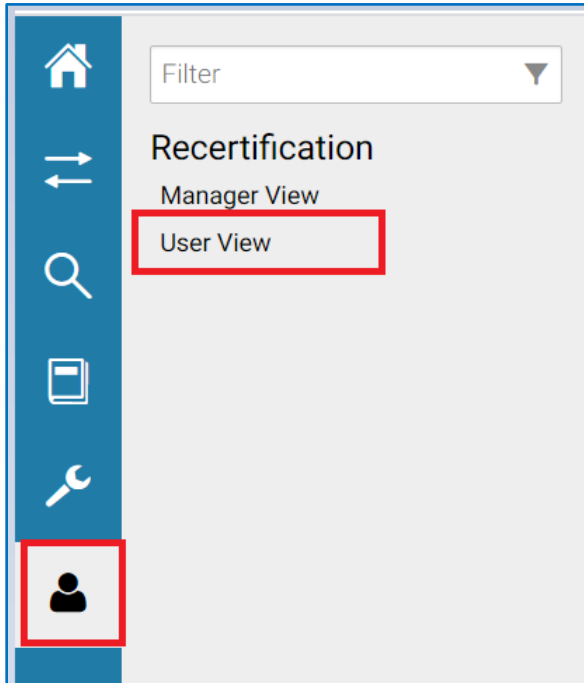
Additional Criteria



## 3. User View

The User View is provided to users to check their own certification status.

1. Log in to [Pegasys](#).
2. Go to the upper left corner and click on Recertification > User View.



3. The User View contains the user's own certification status for the fiscal quarter highlighted below. With this function, each user is now able to check his/her certification status at any time in Pegasys.

**User View**

Expand All Collapse All

Recertification Information

Recertification Status	Approved	Security Roles	RCRTMANAGR, VIEWPEG	Security Organization	Q
Period	Quarter 2: February to April 2020	Roles to Remove			
Manager Email	none@gsa.gov	Approval Types			
Manager Name	John Doe				
Employee Email	none@gsa.gov				
Employee Name	Michael Smith				
Employee UserId	lennyrodriguez				

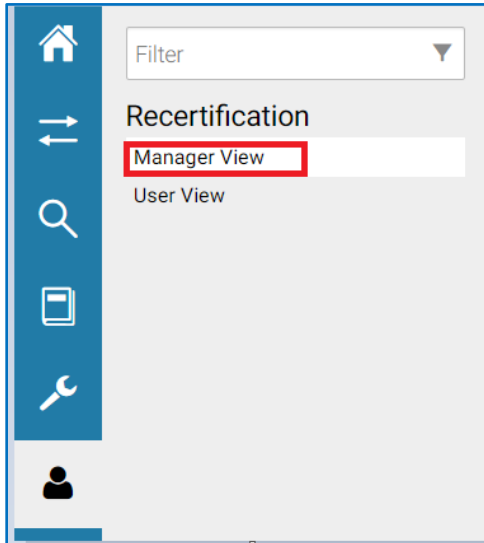


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## 4. Manager View

The Manager View is provided to managers to update their employees' certification status.

1. Log into [Pegasys](#).
2. Go to the upper left corner and click on Recertification > Manager View.



3. Navigate to Recertification > Manager View.
4. When the Manager View opens, the list of employees are pre-populated in the table. Only 10 employees are displayed per page.

**Manager View**

Search Criteria

Recertification Status

Employee Name

1 - 3 of 3 results

Recertification Status	Manager Name	Employee Name	Employee Userid	Security Roles	Approval Types	Roles to Remove	Comments
<input type="radio"/> Uncertified	John Doe	Michael Smith	michaelsmith	RECEIVER, REQUISIT, TRAINING			
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe	DIRPAYER, MLQUERY, OPTIMCERT, PLANNER, REQUISIT, TRAINING, VIEWPEG, VWIMAGE	Prch - Acct Classification, Prch - Authorized Buyer, Prch - Direct Pay Approver, Prch - Manager, Prch - Training Coordinator		
<input type="radio"/> Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

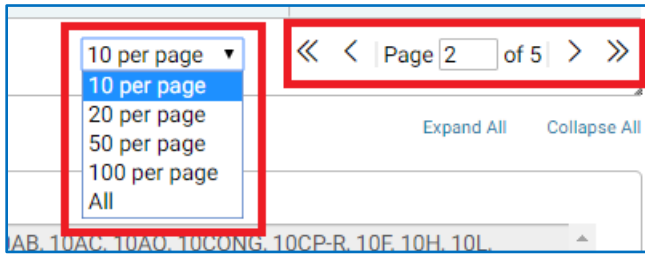
10 per page << < Page 1 of 1 > >>

[Expand All](#) [Collapse All](#)

5. The Recertification Status is initialized to Uncertified for all users before the managers make updates.
6. Review the user records in the list.
7. If the list spans multiple pages, navigate to the next page to display the next group of employees.



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## A. Approved

1. If all users in the list (that may span multiple pages) can be approved, click the “Approve ALL” button. Please skip this step if not every one of the employees should be approved.

\* If a manager has filtered records using the Search Criteria, the “Approve ALL” button will apply to records that are currently in the search results, regardless of the page number. (Refer to *Section F: Tips on using Approve ALL*)

2. If you wish to update the user record individually, click the record you wish to update from the table. The user information appears on the bottom of the screen. The fiscal quarter that is covered in this certification is included in the display.

The screenshot shows a table with 3 results. The table has columns: Recertification Status, Manager Name, Employee Name, Employee Userid, Security Roles, Approval Types, Roles to Remove, and Comments. The first row is highlighted with a red box around the 'Recertification Status' column, which shows a radio button next to 'Uncertified'. Below the table are buttons for 'Submit', 'Approve ALL', and 'Delegate ALL'. At the bottom, there is a form for 'Recertification Information' with fields for 'Recertification Status' (set to 'Uncertified'), 'Period' (set to 'Quarter 2: February to April 2020'), 'Security Roles' (set to 'RECEIVER, REQUISIT, TRAINING'), and 'Security Organization' (set to 'M').

3. To display the menu options in the Recertification Status, click to the left of the dropdown arrow. Choose “Approved” from the “Recertification Status” dropdown.

The screenshot shows the 'Recertification Information' form. The 'Recertification Status' dropdown menu is open, showing options: 'Approved' (highlighted with a red box), 'Denied', 'Manager Change', 'Uncertified', 'Unknown', and 'Delegate'. The 'Period' field is set to '2020'. The 'Manager Email', 'Manager Name', 'Employee Email', 'Employee Name', and 'Employee Userid' fields are also visible.



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- Click the “Submit” button to save your changes.

**Manager View**

<input checked="" type="radio"/> Approved	John Doe	Michael Smith	michaelsmith	RECEIVER, REQUISIT, TRAINING			
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe	DIRPAYER, MLQUERY, OPNITMCERT, PLANNER, REQUISIT, TRAINING, VIEWPEG, VWIMAGE	Prch - Acct Classification, Prch - Authorized Buyer, Prch - Direct Pay Approver, Prch - Manager, Prch - Training Coordinator		
<input type="radio"/> Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

**Submit** Approve ALL Delegate ALL

10 per page << < | Page 1 of 1 | > >>



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## B.Denied

1. Choose the record you wish to update from the table. The user information appears on the bottom of the screen.

1 - 3 of 3 results

Recertification Status	Manager Name	Employee Name	Employee Userid	Security Roles	Approval Types	Roles to Remove	Comments
<input checked="" type="radio"/> Uncertified	John Doe	Michael Smith	michaelsmith	RECEIVER, REQUISIT, TRAINING			
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe	DIRPAYER, MLQUERY, OPNITMCERT, PLANNER, REQUISIT, TRAINING, VIEWPEG, VWIMAGE	Prch - Acct Classification, Prch - Authorized Buyer, Prch - Direct Pay Approver, Prch - Manager, Prch - Training Coordinator		
<input type="radio"/> Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

Submit Approve ALL Delegate ALL

10 per page Page 1 of 1

Expand All Collapse All

Recertification Information

Recertification Status:

Period:

Security Roles:

Security Organization:

2. To display the menu options in the Recertification Status, click to the left of the dropdown arrow. Choose “Denied” from the “Recertification Status” dropdown if the user no longer needs to access Pegasys or a security role(s) should be removed before approving the access.

Recertification Information

Recertification Status:

Period:

Manager Email:

Manager Name:

Employee Email:

Employee Name:

Employee Userid:

Security Roles:

Roles to Remove:

Approval Types:

Security Organization:

Comments:

3. If you deny access to this user because roles have to be removed, enter the roles to remove in the “Roles to Remove” field. The USDA Security Administrator will remove the roles in Pegasys and regard that the remaining roles as approved for continued use by this user.

Recertification Information

Recertification Status:

Period:

Manager Email:

Manager Name:

Employee Email:

Employee Name:

Employee Userid:

Security Roles:

Roles to Remove:

Approval Types:

Security Organization:

Comments:

4. A brief explanation is mandatory when Denied is selected. Enter Comments.



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Recertification Information

Recertification Status	Denied	Security Roles	RECEIVER, REQUISIT, TRAINING	Security Organization	M
Period	Quarter 2: February to April 2020	Roles to Remove		Comments	This employee has retired
Manager Email	none@gsa.gov	Approval Types			
Manager Name	John Doe				
Employee Email	none@gsa.gov				
Employee Name	Michael Smith				
Employee UserId	michaelsmith				

5. Click the “Submit” button to save your changes.

### Manager View

<input checked="" type="radio"/> Denied	John Doe
<input type="radio"/> Uncertified	John Doe
<input type="radio"/> Uncertified	John Doe

**Submit** **Approve ALL** **Delegate ALL**



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## C. Unknown

1. Choose the record you wish to update from the table. The user information appears on the bottom of the screen.

Recertification Status	Manager Name	Employee Name	Employee Userid	Security Roles	Approval Types	Roles to Remove	Comments
<input checked="" type="radio"/> Uncertified	John Doe	Michael Smith	michaelsmith	RECEIVER, REQUISIT, TRAINING			
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe	DIRPAYER, MLQUERY, OPNITMCERT, PLANNER, REQUISIT, TRAINING, VIEWPEG, VWIMAGE	Prch - Acct Classification, Prch - Authorized Buyer, Prch - Direct Pay Approver, Prch - Manager, Prch - Training Coordinator		
<input type="radio"/> Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

Submit Approve ALL Delegate ALL

10 per page << < Page 1 of 1 > >>

Expand All Collapse All

Recertification Information

Recertification Status:  Security Roles: RECEIVER, REQUISIT, TRAINING Security Organization: M

Period:

2. To display the menu options in the Recertification Status, click to the left of the dropdown arrow. Choose “Unknown” from the “Recertification Status” dropdown if you do not recognize the employee.

Recertification Information

Recertification Status:  Security Roles: RECEIVER, REQUISIT, TRAINING Security Organization: M

Period:

Manager Email:  Roles to Remove:

Manager Name:  Approval Types:

Employee Email:

Employee Name:

Employee Userid:

Comments:

3. Enter comments as needed.

Recertification Information

Recertification Status:  Security Roles: ADMIN, BATCHSETUP, BFILELAYOT, CREDCRDADM, CREDCRDHL, CREDCRVIEW, REPORTDEV, VIEWBAAR, VIEWFINRPS, VIEWPEG, VWCCAPRGRP, VWIMAGE, VWORKFLOW Security Organization: 10A, 10AB, 10AC, 10AQ, 10CP-R, 10F, 10H, 10L, 10MIXED, 10P, 10P-R, 10PF-GMA, 10Q, 10T, 10TR, 10TT, 1A, 1AB, 1AD, 1AQ, 1BB, 1CA, 1CP, 1CP-R, 1H, 1KT, 1L, 1MIXED, 1P, 1P-R, 1PA, 1PB, 1PC, 1PD, 1PE, 1PM, 1PP, 1PS, 1PT, 1Q, 1T, 1TR, 1TT, 2A, 2AD, 2AR, 2CP-R, 2F, 2H

Period:

Manager Email:  Roles to Remove:

Manager Name:  Approval Types:

Employee Email:

Employee Name:

Employee Userid:

Comments:



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Click the “Submit” button to save your changes.

1 - 3 of 3 results

Recertification Status	Manager Name	Employee Name	Employee UserId
<input checked="" type="radio"/> Unknown	John Doe	Michael Smith	michaelsmith
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe
<input type="radio"/> Uncertified	John Doe	Juan Perez	juanperez

Submit

Approve ALL

Delegate ALL



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### D. Manager Change

- Choose the record you wish to update from the table. The user information appears on the bottom of the screen.

Recertification Status	Manager Name	Employee Name	Employee Userid	Security Roles	Approval Types	Roles to Remove	Comments
<input checked="" type="radio"/> Uncertified	John Doe	Michael Smith	michaelsmith	RECEIVER, REQUISIT, TRAINING			
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe	DIRPAYER, MLQUERY, OPNITMCERT, PLANNER, REQUISIT, TRAINING, VIEWPEG, VWIMAGE	Prch - Acct Classification, Prch - Authorized Buyer, Prch - Direct Pay Approver, Prch - Manager, Prch - Training Coordinator		
<input type="radio"/> Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

10 per page Page 1 of 1

Submit Approve ALL Delegate ALL

Recertification Information

Recertification Status: Uncertified Security Roles: RECEIVER, REQUISIT, TRAINING Security Organization: M

Period: Quarter 2: February to April 2020

- To display the menu options in the Recertification Status, click to the left of the dropdown arrow. Choose “Manager Change” from the “Recertification Status” dropdown if the employee no longer reports to you.

Recertification Information

Recertification Status: Manager Change

Period: 20

Manager Email:

Manager Name:

Employee Email:

Employee Name:

Employee Userid:

Approved

Denied

Manager Change

Uncertified

Unknown

Delegate

- If you know who the new manager is, enter the new manager information in the Comments. If you do not know who the new manager is, you may leave the Comments blank.

Recertification Information

Recertification Status: Manager Change

Period: Quarter 2: February to April 2020

Manager Email: none@gsa.gov

Manager Name: John Doe

Employee Email: none@gsa.gov

Employee Name: Michael Smith

Employee Userid: michaelsmith

Security Roles: ADMIN, BATCHSETUP, BFILELAYOT, CREDCRDADM, CREDCRDHL, CREDCRVIEW, REPORTDEV, VIEWBAAR, VIEWFINRPS, VIEWPEG, VWCCAPRGRP, VWIMAGE, VWORKFLOW

Roles to Remove:

Approval Types:

Security Organization: 10A, 10AB, 10AC, 10AQ, 10CP-R, 10F, 10H, 10L, 10MIXED, 10P, 10P-R, 10PF-GMA, 10Q, 10T, 10TR, 10TT, 1A, 1AB, 1AD, 1AQ, 1BB, 1CA, 1CP, 1CP-R, 1H, 1KT, 1L, 1MIXED, 1P, 1P-R, 1PA, 1PB, 1PC, 1PD, 1PE, 1PM, 1PP, 1PS, 1PT, 1Q, 1T, 1TR, 1TT, 2A, 2AD, 2AR, 2CP-R, 2F, 2H,

Comments: New manager is Jordan Smith



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7. Click the “Submit” button to save your changes

1 - 2 of 2 results

Recertification Status	Manager Name
<input checked="" type="radio"/> Manager Change	John Doe
<input type="radio"/> Approved	John Doe

**Submit** **Approve ALL** **Delegate ALL**





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## E. Delegate

1. Choose the record you wish to update from the table. The user information appears on the bottom of the screen.

Recertification Status	Manager Name	Employee Name	Employee UserId	Security Roles	Approval Types	Roles to Remove	Comments
<span>●</span> Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

Submit Approve ALL Delegate ALL

10 per page Page 1 of 1

Expand All Collapse All

Recertification Information

Recertification Status: Uncertified

Security Roles: RECEIVER, REQUISIT, TRAINING

Security Organization: MI, MV

Period: Quarter 2: February to April 2020

2. To display the menu options in the Recertification Status, click to the left of the dropdown arrow. Choose "Delegate" from the "Recertification Status" dropdown if you wish to delegate the recertification task to another manager for this cycle. You may enter the manager's name or email information in the Comments.

Recertification Information

Recertification Status: Delegate

Period: 20

Manager Email

Manager Name

Employee Email

Employee Name

Employee UserId

Approved

Denied

Manager Change

Uncertified

Unknown

Delegate

3. Enter the manager name or email address to whom you intend to delegate the recertification task for this cycle. The delegated manager will be notified by email to recertify your employees.



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Recertification Information		Security Roles	RECEIVER, REQUISIT, TRAINING	Security Organization	M
Recertification Status	<input type="text" value="Delegate"/>	Roles to Remove		Comments	New manager is <u>Jorden</u> Smith
Period	Quarter 2: February to April 2020	Approval Types			
Manager Email	none@gsa.gov				
Manager Name	John Doe				
Employee Email	none@gsa.gov				
Employee Name	Michael Smith				
Employee Userid	michaelsmith				

4. Click the “Submit” button to save your changes.

1 - 2 of 2 results	
Recertification Status	Manager Name
<input checked="" type="radio"/> Delegate	John Doe
<input type="radio"/> Approved	John Doe
<div><div>Submit</div><div>Approve ALL</div><div>Delegate ALL</div></div>	



### 5. Other Recertification Status codes

1. The Uncertified status indicates the initial status of all users at the start of the certification cycle.



## 6. Tips on using Approve ALL

The Approve ALL button provides a convenient way to set the Recertification Status to “Approved” for the user records in the view. The following describes how to use the Approve ALL in 2 situations. These tips are particularly useful if you have a large number of employees to certify.

- If ALL the user records in the view are to be approved with no exceptions, click the Approve ALL button and the action is complete. You may log out at this point.
- If not all the records in the view are to be approved, then you may wish to use this approach to expedite your task.
  - First update the Recertification Status for the users with exceptions (i.e. other than Approved). It is expected that these would be a smaller number of users in your list.
  - Once you have updated these records with status other than Approve, proceed to the “Search Criteria” section above the table view.

The screenshot shows the 'Search Criteria' section with a 'Recertification Status' dropdown menu open. The dropdown lists the following options: Approved, Denied, Manager Change, Uncertified, Unknown, and Delegate. Below the dropdown is a table with the following columns: Recertification Status, Manager Name, and Employ. The table shows 1 - 1 of 1 results. The first row has a green circle icon, the status 'Uncertified', the name 'John Doe', and the employer 'Juanpere'.

Recertification Status	Manager Name	Employ
Uncertified	John Doe	Juanpere

- Select “Uncertified” from the dropdown and click the Search button. This will display users that have yet to be recertified. The list may span multiple pages depending on how many employees report to you.
- At this point, if you click Approve ALL, all the users in the results will have their status updated to Approve.
- You may clear the Search Criteria to review the status of all your employees before logging out.



## 7. Tips on using Delegate ALL

The Delegate ALL button provides a convenient way to set the Recertification Status to “Delegate” for the user records in the view. The following describes how to use the Delegate ALL in 2 situations. These tips are particularly useful if you have a large number of employees to delegate and/or you wish to Delegate only for a segment of uncertified employees.

- If ALL the user records in the view are to be delegated with no exceptions, click the Delegate ALL button. Enter the manager’s name and/or email address in the popup and click “Submit”. The action is complete. You may log out at this point.
- If not all the records in the view are to be delegated, then you may wish to use this approach to expedite your task.
  - First set the Recertification Status for the users to Approved/Denied/Unknown, leaving only the Uncertified users in the list.
  - Once you have updated these records with status other than Uncertified, proceed to the “Search Criteria” section above the table view.

The screenshot shows the 'Search Criteria' section with a 'Recertification Status' dropdown menu open. The dropdown lists: Approved, Denied, Manager Change, Uncertified, Unknown, and Delegate. Below the dropdown is a table with columns 'Recertification Status' and 'Manager Name'. The table shows one result: 'Uncertified' and 'John Doe'. The 'Employ' column is partially visible on the right.

Recertification Status	Manager Name
Uncertified	John Doe

- Select “Uncertified” from the dropdown and click the Search button. This will display users that have yet to be recertified. The list may span multiple pages depending on how many employees report to you.
- At this point, if you click Delegate ALL, a popup screen will prompt you for the delegated manager’s name or email address. Click “Submit”. All the users in the results will have their status updated to Delegate and the Comments will be updated with the delegated manager’s information that you entered in the popup.
- You may clear the Search Criteria to review the status of all your employees before logging out.