



Pegasys User Certification - User Guide

Contents

1. Overview	2
2. Login process for New Managers or Users	3
3. User View	6
4. Manager View	7
A.Approved	9
B.Denied.....	11
C.Unknown.....	13
D.Manager Change.....	15
E.Delegate	17
5. Other Recertification Status codes.....	19
6. Tips on using Approve ALL	20
7. Tips on using Delegate ALL	21



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.

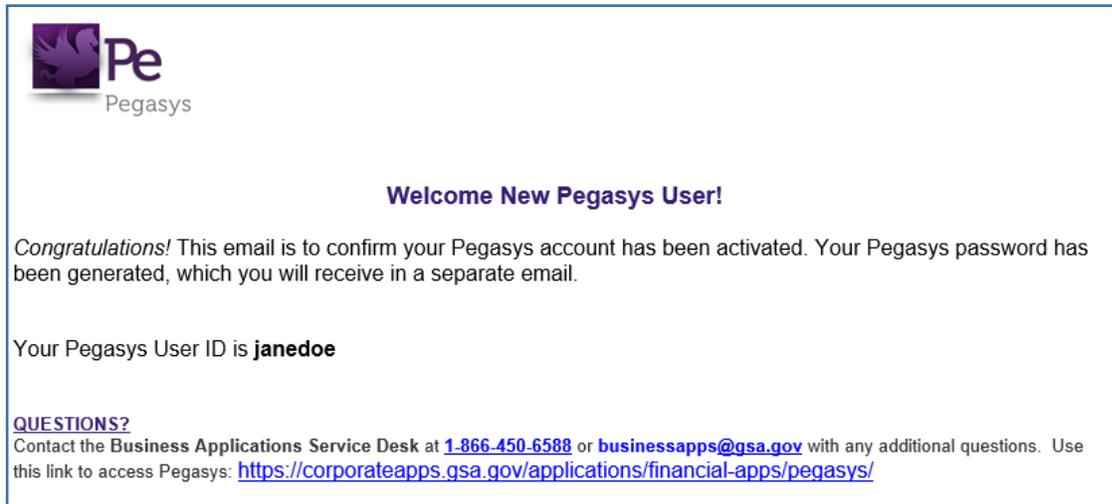


Pegasys User Certification - User Guide

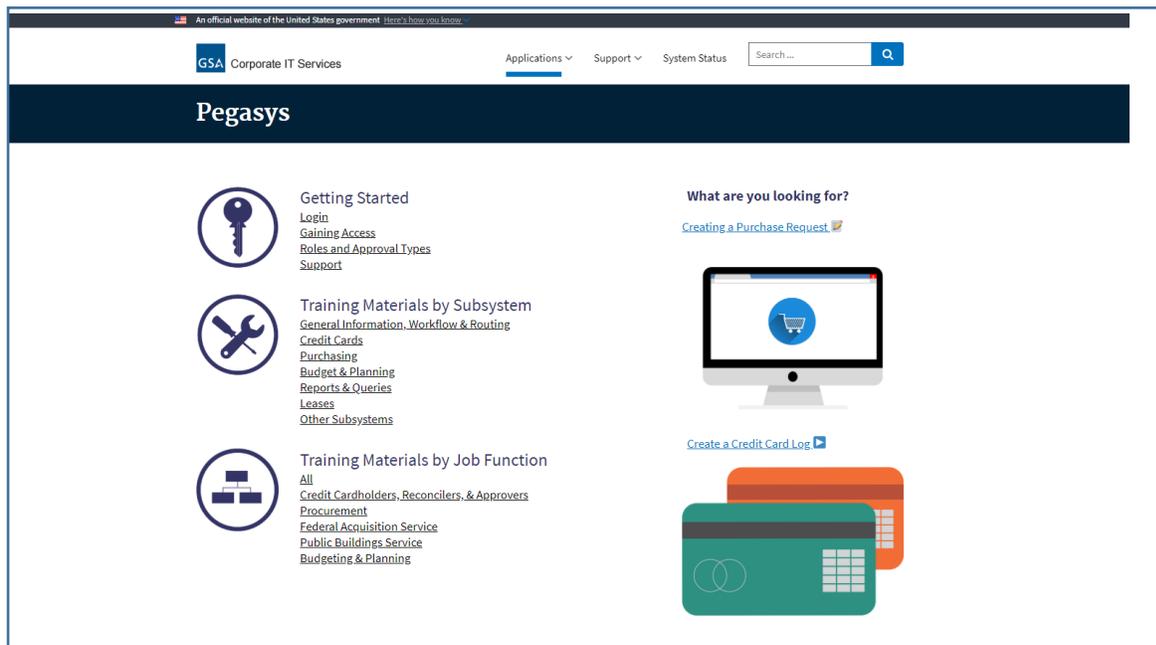
2. Login process for New Managers or Users

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.



Pegasis User Certification - User Guide

4. If this is the first time that you log in to Pegasis, 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

The screenshot shows a web browser window with the address bar displaying a URL from a test environment. The page title is "Pegasis Identity Provider". The main content area contains a login form with the following elements:

- User ID:** A text input field containing the text "taylorswift".
- Password:** A password input field with masked characters ".....".
- Forgot Password:** A link below the password field.
- Sign In:** A blue button.

At the bottom of the page, there is a disclaimer: "This commercial computer software is delivered with restricted rights to the Government. Use, reproduction, or disclosure is subject to the restrictions set forth in the FAR, DFARS, or other license provisions referenced in the contract." and a copyright notice: "(C) 1997, 2019 CGI Federal Inc. All rights reserved."

Login Confirmation screen

The screenshot shows the "Login Confirmation" screen. At the top, it says "Pegasis Identity Provider". Below that, it indicates "1 - 2 of 2 results". A message box shows: "Your last successful login was 01/17/2020 10:30:15".

The main section is titled "Login Confirmation" and contains the text: "You have logged in successfully against the Identity Provider. Press the OK button below to proceed to the target service provider." Below this text is a blue "OK" button.

At the bottom left, there is a link: "Go to top of page". At the bottom right, there are links: "Expand All" and "Collapse All".

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



Pegasys User Certification - User Guide



**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

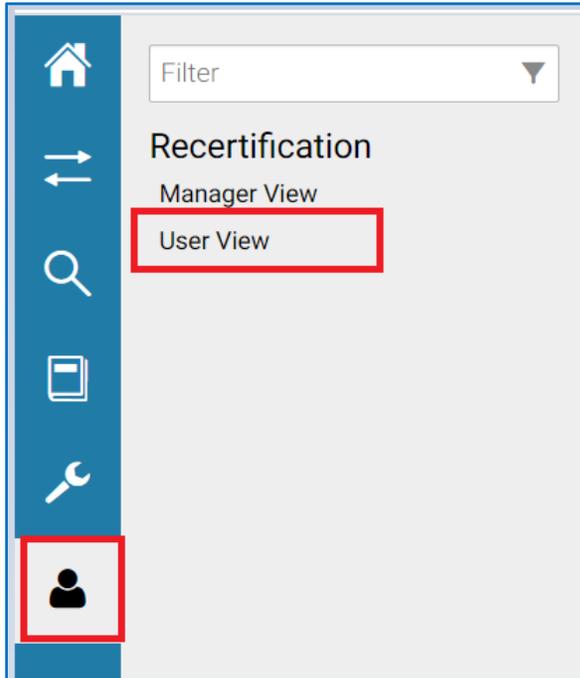
 



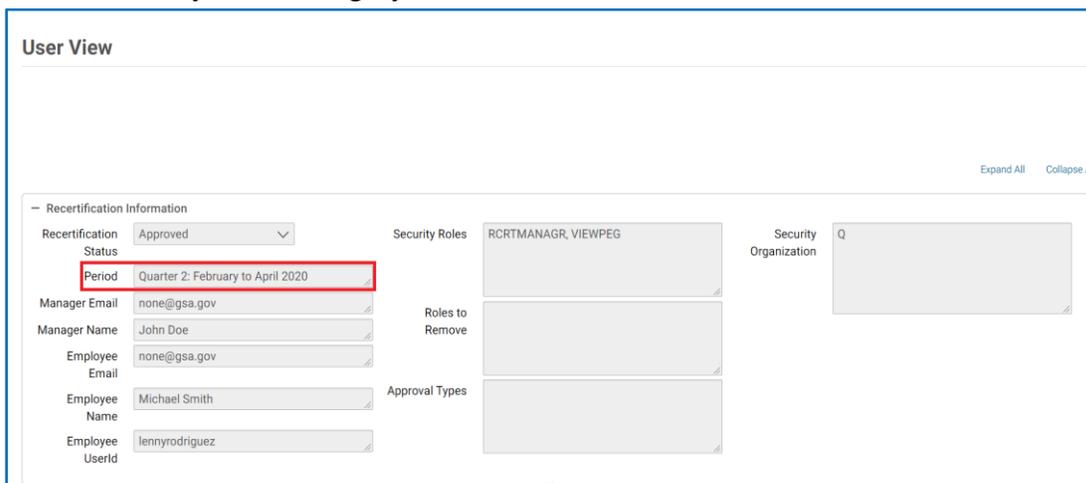
3. User View

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.

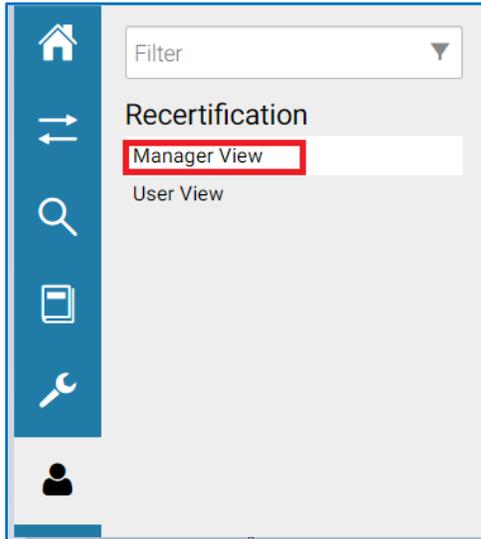




4. Manager View

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

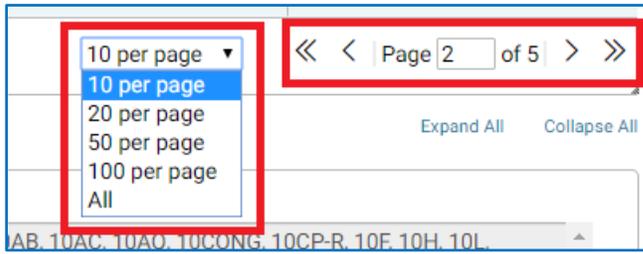
Recertification Status	Manager Name	Employee Name	Employee Userid	Security Roles	Approval Types	Roles to Remove	Comments
<input type="radio"/> Uncertified	John Doe	Michael Smith	michaelsmith	RECEIVER, REQUISIT, TRAINING			
<input type="radio"/> Uncertified	John Doe	Jane Doe	janedoe	DIRPAYER, MLQUERY, 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

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.



Pegasys User Certification - User Guide





Pegasys User Certification - User Guide

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.

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		

Buttons: **Submit** **Approve ALL** **Delegate ALL**

10 per page | Page 1 of 1

Recertification Information

Recertification Status:

Security Roles: RECEIVER, REQUISIT, TRAINING

Security Organization: M

Period:

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.

Recertification Information

Recertification Status:

Period:

Manager Email:

Manager Name:

Employee Email:

Employee Name:

Employee Userid:

Dropdown Menu Options:

- Approved
- Denied
- Manager Change
- Uncertified
- Unknown
- Delegate



Pegasys User Certification - User Guide

4. 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 ▶ ▷



Pegasys User Certification - User Guide

B. Denied

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

Recertification Information

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

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 “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: Denied (dropdown menu open)

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: RECEIVER, REQUISIT, TRAINING

Roles to Remove:

Approval Types:

Security Organization: M

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: Denied

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: RECEIVER, REQUISIT, TRAINING

Roles to Remove:

Approval Types:

Security Organization: M

Comments:

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



Pegasys User Certification - User Guide

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**



Pegasys User Certification - User Guide

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: Comments:

Employee Name: Approval Types:

Employee Userid: Approval Types:

3. Enter comments as needed.

Recertification Information

Recertification Status: Security Roles: ADMIN, BATCHSETUP, BFILELAYOT, CREDCRDADM, CREDCRDHLD, 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: Comments:

Employee Name: Approval Types:

Employee Userid: Approval Types:



Pegasys User Certification - User Guide

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



Pegasys User Certification - User Guide

D. Manager Change

- 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

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, CREDCRDHLD, CREDCRVIEW, REPORTDEV, VIEWBAAR, VIEWFINRPS, VIEWPEG, VWCCAPRGR: 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**



Pegasys User Certification - User Guide

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**



Pegasys User Certification - User Guide

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
Uncertified	John Doe	Juan Perez	juanperez	RECEIVER, REQUISIT, TRAINING	Prch - Manager		

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.



Pegasys User Certification - User Guide

Recertification Information

Recertification Status	Delegate	Security Roles	RECEIVER, REQUISIT, TRAINING	Security Organization	M
Period	Quarter 2: February to April 2020	Roles to Remove		Comments	New manager is <u>Jorden</u> Smith
Manager Email	none@gsa.gov	Approval Types			
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

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



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 of the Pegasys User Certification interface. A red box highlights the 'Search Criteria' label. Another red box highlights the 'Recertification Status' dropdown menu, which is currently open and showing a list of options: Approved, Denied, Manager Change, Uncertified, Unknown, and Delegate. Below the dropdown, the 'Employee Name' field is visible. The table below shows 1 - 1 of 1 results with columns for 'Recertification Status' and 'Manager Name'. The first row shows 'Uncertified' and 'John Doe'. A red box also highlights the 'Employ' button on the right side of the table.

- 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 of the Pegasys User Certification interface. A red box highlights the 'Search Criteria' label. Another red box highlights the 'Recertification Status' dropdown menu, which is currently open and showing a list of options: Approved, Denied, Manager Change, Uncertified, Unknown, and Delegate. Below the dropdown, the 'Employee Name' field is visible. The table below shows 1 - 1 of 1 results with columns for Recertification Status and Manager Name. The first row shows 'Uncertified' and 'John Doe'. A third red box highlights the 'Uncertified' status in the table row.

- 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.