

Introduction to Workflow

- All Purchasing Request and Order forms must be approved before they can be processed within Pegasys.
- The form's creator shall add the appropriate approvers to the form on the form's Approval Routing page. All approvers must be added to the form, even if one of the approvers is the form's creator.
- Multiple approvers can be added to the form at once using a routing list. For more information on creating a routing list, please see the ***Route Forms and Create Custom Routing Lists Quick Reference Card***.
- On submission, Workflow automatically routes the form for approval to the Inbox of the approving officials listed on the form.
- If multiple approvals are required on the form, Workflow routes the form to users in a fixed order determined by the type of approval, set forth by GSA Policy, and not by the order of the approvers listed on the form's Approval Routing page.
- After the final approval is applied, Workflow automatically submits and processes the form.
- The form's submitter is the user associated with the processed document in Pegasys.

Adding Individual Approvers to a Form

When approvals are required for a form to process successfully, the proper approving officials must be added on the form's Approval Routing page before submission.

1. On the form, click the **Approval Routing** tab.
2. Click **Add User**. *The Search page displays.*
3. Enter the **User ID** or **Name** of the form's approver in the appropriate fields

4. Click **Search**.
5. Select the record for the approver of the form from the generated list.
6. Click **Select**.
7. The selected user will be added to the list of approvers on the **Approval Routing** page. Repeat steps 2-6 to add additional approvers to the form.

Adding a List of Approvers to a Form

Multiple approving officials can be added at once to the Approval Routing page on a form by utilizing a routing list.

1. On the form, click the **Approval Routing** tab.
2. Click **Add Routing List**.
3. Enter the **Routing List Code** or **Routing List Name** in the appropriate fields. If the exact **Routing List Code** or **Routing List Name** is unknown, then the asterisk ("*") may be used as a wildcard in the search.
4. Click **Search**.
5. Select the record for the routing list from the generated list.
6. Click **Select**.
7. The users saved in the routing list will be added to the list of approvers on the **Approval Routing** page. Repeat steps 2-6 to add additional routing lists to the form.

Applying Approvals

Users can only apply approvals to forms that are opened from the **Inbox**. Forms requiring approval will appear in the Inbox as Approve Form tasks.

1. View the **Inbox**. If returning to the **Inbox** from another page in Pegasys, click **Refresh**.
2. Highlight the Approve Form task record, and then click **Open**.
3. The form will appear in a read-only mode.

4. Click **Workflow Status** to show any approvals already applied since the form was submitted.
5. Click **OK** to go back.
6. Click **Approval History** to show the approval log for the form.
7. Click **OK** to go back.
8. Review the form to ensure it contains the required information.
9. If the form is acceptable, click **Approve**. Enter comments on the approval as necessary, then click Continue. These comments will appear in the **Memos** page on the form/document.
10. If the form is *unacceptable*, click **Disapprove**. Comments are required when users disapprove a form. Click **Continue**. These comments will appear on the **Memos** page of the form/document.
11. System message "The Work Item has been Completed" indicates that the Workflow action "approve" or "disapprove" was successfully submitted.

Alternate Assignees

A designated Alternate Assignee will receive tasks when a user is unavailable.

1. Navigate to User Preferences > Availability
2. Click the **Alternate Assignees** link
3. Click **Add**
4. Enter a User ID in the ID field
To ensure that the user is available, check the Available checkbox.
5. Select the user and click **Select**
6. Click **Save**
7. To add additional alternate assignees, repeat steps 3-6.
8. To delete an alternate assignee, select the assignee and click **Delete**.
9. To return to the **Availability** tab, click the **Availability** tab.

Availability

Users have the ability to set up their availability or when they will be out of the office on the Availability tab of User Preferences.

1. Navigate to Preferences > Availability
2. On the Availability tab in the Main Participate Details group box, uncheck the **Available** checkbox to indicate that you are not available.
3. Click **Save**. The current date will default in the Unavailable As Of field.

Note: An alternate assignee must be assigned in order to save.

GSA Policy

- **Purchase Request** forms require three approval types. One person can have the authority to apply one or more approval types. The types include the following: **Manager**—An approval generally applied by the requester's manager that indicates that the specified items may be requested, **Accounting Classification**—An approval that indicates that the appropriate accounting template(s) was applied to the request, and **Funds Authorization**—An approval that indicates that the funding is available for the accounting strip specified on the request. Pegasys routes Purchase Requests to users for approval in the order listed above.
- On **Purchase Orders** an Authorized Buyer must approve orders that are equal to or less than \$3000, and a **Contracting Officer** must approve orders for more than \$3000.
- **Training Requests and Training Orders** require four approval types. One person can have the authority to apply one or more approval types. The types include the following:
Manager, Account Classification, Funds Authorization, and Training Coordinator—(An approval generally applied by an individual who schedules and plans training within an office that

indicates the requested training is acceptable). Pegasys routes Training Requests and Training Orders to users for approval in the order listed above.

- All **Direct Payment** forms require a minimum of three approvals: **Direct Pay Approver, Accounting Classification, and Funds Authorization**. Direct Payments that are greater than \$3000 also require a **Finance** approval after these three approvals have been applied. In addition, users must route all forms greater than \$3000 to be approved by Region 6 to the 6BCP Direct Pay routing list and forms to be approved by Region 7 to the 7BCP Direct Pay routing list. Pegasys routes Direct Payment forms to users for approval in the order listed above.

Pegasys Resources

- **Functional Coordinator**
- **Service Representative**
- **Pegasys Web Site**
<http://pegasys.gsa.gov>
- **Pegasys User Guides**
- **Quick Reference Cards**
- **Name - OCFO Service Desk**
Email address -
OCFOServiceDesk@gsa.gov
Telephone Number - 1-866-450-6588



**General
Services
Administration**

The Integrated Financial Management System



Pegasys 6.5.0: Workflow for Approvals Quick Reference Card