

Signing into Pegasys

1. Open your web browser and enter the designated URL address:
<http://pegasys.gsa.gov>
2. Enter your Pegasys User ID in the **User Name** field (*lowercase*).
3. Enter your Pegasys password in the **Password** field (*case sensitive and without spaces*).
4. Click the **Sign In** button.

If Pegasys finds an existing session for your User ID, a notification appears. To close that existing session, click the **Continue** button. The previous session will close and you will be signed in.



User ID:

Password:

[Forgot your password?](#)

Figure 1: Sign In Screen

Signing off Pegasys

1. In the **Link Strip**, click the **Sign Out** link.
2. Do not click the 'X' in your web browser to close Pegasys. This will not sign you out of the application.

Menu bar

The menu bar displays the menu options available on the Pegasys desktop.

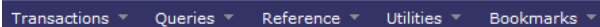
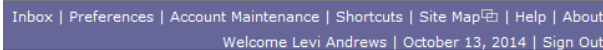


Figure 2: Pegasys Menu bar

- **Transactions**— Allows users to search, create, amend, correct, view, delete, review, and cancel forms and documents by subsystem.
- **Queries**— Allows users to perform subsystem specific queries.
- **Reference**—Provides access to reference data tables used by Pegasys.
- **Utilities**—Provides access to the Pegasys Reports Portal.
- **Bookmarks**—A customizable pull-down menu that includes user-specified links to frequently-used Pegasys queries and reference tables without having to navigate through the other menus in the Menu Bar.

Link Strip



[Inbox](#) | [Preferences](#) | [Account Maintenance](#) | [Shortcuts](#) | [Site Map](#) | [Help](#) | [About](#)
Welcome Levi Andrews | October 13, 2014 | [Sign Out](#)

Figure 3: Pegasys Link Strip

The Link Strip contains the following hyperlinks:

- **Inbox**—Returns users to their Inbox.
- **Preferences**—Allows users to customize the look of Pegasys by setting styles, bookmarks, defaults, search limits, alternate assignees, etc.
- **Account Maintenance**—Change passwords and set up security questions and answers.
- **Shortcuts**—Allows users direct access to forms and documents.
- **Site Map**—Provides an alternative way to view menus and their contents.
- **New Window** icon—Allows users to open a new window in the same Pegasys session.
- **Help**—Access to Pegasys on-line help topics.
- **About**—Displays technical and legal information about this version of Pegasys.
- **Sign Out**—Allows users to exit Pegasys.

User name and date are displayed before the Sign Out link.

User Preferences

To access the User Preferences option, select the **Preferences** hyperlink in the **Link Strip**.

- **Styles**—Allows users to choose the overall look and feel of Pegasys, based on pre-set themes.
- **Bookmarks**—Allows users to organize their bookmarks.
- **Advanced Options**—Specify a search limit.
- **Usability Settings** - Allows users to change their options for automatic tabbing, expanded sections and an alternate start page as well as indicating whether or not they are expert users.
- **Document Defaults**— Allows users to set defaults for the Vendor, Accounting Template, and Currency to be used when forms are created.
- **Office Defaults**—Allows users to set default location code values for multiple offices.
- **Workflow Options** – Allows users to view their workflow options.
- **Availability** – Allows users to change their availability status. When a user's availability status is set to unavailable, their tasks will be routed to users designated as alternate assignees. See Chapter 2 of both the Purchasing and Finance User Guides.

Breadcrumbs Track

Breadcrumbs trace the user's navigation path through Pegasys. The current page is the right-most breadcrumb. Each breadcrumb is a hyperlink. Users must click these hyperlinks to navigate back to previously accessed pages in lieu of the Internet Explorer back button



[Pegasys](#) > [Queries](#) > [Purchasing](#) > Purchase Query

Figure 4: Pegasys Breadcrumb Path

Inbox

Inbox Completed Tasks
Last Refreshed: 10/13/2014

Search Criteria

Task: Expected Completion Date: From: To:
 Item:
 Priority:
 Task Status:
 Task Description:

Search Clear

Document

User Defined Fields

Refresh Open and Acquire View Acquire Release Task History Original Assignees Messages Sgrt...

Expected Completion Date	Priority	Task	Item	Task Description	Assign Date
07/19/2014	Medium	Approve Form	IX IX018459	Approve PENDING APPROVAL IX IX018459 Form 00001	07/18/20

Figure 5: Pegasys Inbox

To open a workflow task listed in the Inbox:

1. View the **Inbox**. If returning to the **Inbox** from another page in Pegasys, click **Refresh**. **Search** on dates, document type or number, vendor code, etc. to limit the results displayed.
2. Highlight the workflow task record, and then click **Open and Acquire**.
3. For **Approve Form** and **Correct Form** tasks, the form will appear onscreen. If opening an **Ad-Hoc Routing Task**, then the **Notification of Ad Hoc Mailing Router Workflow Task** page will be displayed.
4. If the ad-hoc routed item is a form, click **Correct** to open the form in edit mode.
5. The **Ad-Hoc Routing Task** will remain in the Inbox until the assignment is manually completed. Therefore when finished with the form, click **Complete** on the **Notification of Ad Hoc Mailing Router Workflow Task** page.
6. **Approve Form** and **Correct Form** tasks will be removed automatically from the Inbox after the user has either approved or resubmitted the corrected form.

7. When tasks are completed, they are moved from the **Inbox** to the **Completed Tasks** Tab.

GSA Policy

- To establish User Preferred Limits, navigate to **Preferences - Advanced Options** and enter 500 as the User Preferred Limit. Save changes to the **Advanced Options** page by clicking the **Save** button at the top of the page.
- Initial temporary passwords expire after the first login. If the user fails to change the temporary password, or if the password is forgotten, call the Service Desk to have a new temporary password assigned.
- If Security Questions and Answers have been set up, click on the **Forgot Your Password** link on the sign in screen and follow the prompts to reset your password.
- To set up Security Questions and Answers:
 1. Click the **Account Maintenance** link.
 2. Click the **Security Questions and Answers Page**.
 3. Select from list in the Questions column.
 4. Enter Answer in the next column.
 5. Repeat for a second question and answer.

Pegasys Resources

- **Functional Coordinator**
- **Service Representative**
- **Pegasys Web Site**
<http://pegasys.gsa.gov>
- **Pegasys User Guides**
- **Quick Reference Cards**
- **Financial Systems Service Desk**
OCFOServiceDesk@gsa.gov
1-866-450-6588



**General
Services
Administration**

The Integrated Financial Management System



Pegasys 7.1.2: Getting Started with Pegasys Quick Reference Card