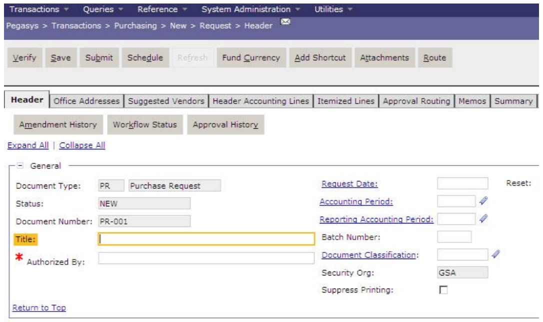
Introduction

- The request records the intent to buy goods or services. While the request is not legally binding, it commits funds for a future purchase.
- Fields with red asterisks (*) are mandatory for Pegasys processes, but may not include all fields required by GSA policy.
- In Pegasys, users create one document type to record both non-itemized and itemized transactions.
- For detailed information, please refer to the Reservations and Requests chapter of the Purchasing User Guide.

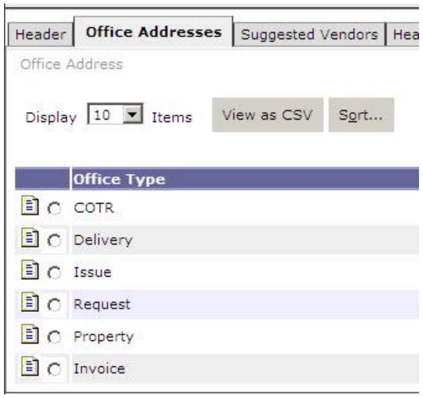
Creating a Purchase Request

1. Log into **Pegasys**.
2. Select **Transactions—Purchasing—New—Request** from the menu bar.
3. Enter **PR** in the **Document Type** field.
4. Click Generate to generate a unique number in the **Document Number**.
    - *Leave the **Security Org** and **Document Title** fields blank.*
5. Click **Finish** to display the form's **Header** page.

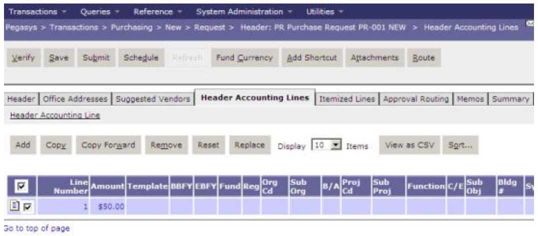


- *The user's default **Security Org** will populate the field on the **Header** page. The default Security Org is **GSA**.*

6. In the **General** group box, enter the requester's name in the **Authorized By** field.
    - ***Request Date**, **Accounting Period**, and **Reporting Accounting Period** fields will default to the current date, when the form is Verified or Processed.*
    - *Leave the Document Classification field blank.*
7. In the **Vendor Information** group box, enter or click the **Code** hyperlink to search for a vendor and follow the steps below.
    - *The **Search—Vendor Code** page displays. Enter the applicable search criteria and click **Search**.*
    - *Find the appropriate vendor record and click the corresponding **Select** button. The **Vendor Name** field will populate from the Vendor Code that is selected.*
8. Codes for suggested vendors can be entered on the **Suggested Vendors** page by clicking the **Suggested Vendors** tab and clicking **Add**.
9. In the **Contract** group box, use the **Contracts Number** field to enter the Contract Number.
10. Select the **Office Addresses** tab. *The **Office Address** tab displays.*



11. Select the appropriate **Office Type** and click the **Office Address** link. The specific Office Address page displays.
12. The **Office Type** field defaults to the Office Type selected on the **Office Addresses** page.
    - *(Delivery, Issue, and Request addresses are required.)*
13. Enter the appropriate address code in the **Code** field.
14. Click **Get Address** to populate the fields in the **Address Information** section.
15. To return to the **Office Addresses** page click the **Office Addresses** link and repeat steps **11-14**.
16. Select the **Header Accounting Lines** tab. *The **Header Accounting Lines** page displays.*



18. Click **Add** to create a new line. *A new **Header Accounting Line** page displays.*
19. In the **Line Amounts** group box, enter the dollar amount in the **Requested** field,
20. In the **Accounting Dimensions** group box, enter or click the **Template** hyperlink to search for a template and follow the steps below.
    - *The **Search—Template** page displays.*
    - *Enter the applicable search criteria and click **Search**. Find the appropriate template record and click the corresponding **Select** button.*
    - *The selected template will populate in the **Template** field.*
21. Click **Default** to populate the accounting dimensions.

22. Enter any other required accounting elements or Agreements.

- *The **B/A (Budget Activity)** and Function Code fields will have the appropriate two-character prefix (e.g. "PG").*

23. Go to the **Description** field to enter descriptive information.

24. Return to the **Header Accounting Lines** page by clicking on the **Header Accounting Lines** hyperlink.

25. To add additional accounting lines, repeat **Steps 18-24** above.

- *A line may be copied by selecting the desired line, clicking **Copy**. Then select the newly copied line and click the **Header Accounting Lines** page and make the needed modifications.*
- *A line may be deleted by selecting the appropriate line and clicking **Remove**.*

26. To view a summary of the header accounting lines or make changes to the header accounting lines, click the **Summary** tab.

27. Click the **Approval Routing** tab and add the appropriate approvers individually or via a routing list.

28. Click **Verify**. *Correct any errors that are displayed.*

29. Click **Submit** to submit the form for approvals.

GSA Policy

- All requests require **Accounting Classification, Funds Authorization**, and **Manager** approvals.
- The **Vendor Code** field is optional on the request. Use the **Suggested Vendors** page to recommend vendors.
- If needed, the user can list additional Suggested Vendors in an attachment.
- If vendor is not listed in the **Vendor Maintenance** table, contact your Finance Center to have the vendor set-up in Pegasys.
- The Requisitioner and the name entered on the **Delivery** office address tab page will receive an e-mail notification if receipt is not logged at the time the invoice is logged.

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: Creating Requests Quick Reference Card

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