

Introduction

Pegasys provides the tools needed to effectively manage the financial and administrative operations of the General Services Administration. The system offers extensive functionality to record financial planning and purchasing events as well as accounts payable, disbursement, and budgeting activities.

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?](#)

Signing off Pegasys

1. In the **Link Strip**, click the **Sign Out** hyperlink.
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.

Transactions ▾ Queries ▾ Reference ▾ Utilities ▾ Bookmarks ▾

- **Transactions**— Allows users to create, amend, correct, view, delete, review, and cancel forms and documents by subsystem. Form/Document Selection also appears here, and provides access to forms and documents in all subsystems.
- **Queries**— Allows users to perform queries by category.
- **Reference**—Provides access to reference data tables used by Pegasys.
- **Utilities**—Provides access to standard Pegasys reports, as well as the ability to print certain forms, documents, and reports.
- **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 | Shortcuts | Site Map  | Help | About | 
Welcome Bridget R. Jones | November 18, 2010 | Sign Out

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, user defaults, and advanced options. It also allows users to change their passwords.
- **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**—Allows users to access 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**—Allows users to 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.
- **User Information**—Allows users to change their current passwords and manage email address.
- **Security Question and Answer Page** – Allows users to select a question and answer to be used for forgotten password reset.
- **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.



The Integrated Financial Management System



Pegasys 6.5.0: Getting Started with Pegasys Quick Reference Card

January 2011 Final

Breadcrumbs Track

Breadcrumbs trace the user's path as he/she navigates 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 button or Netscape Navigator Back button

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

Inbox

Expected Completion Date	Priority	Task	Item	Description
11/19/2010	Urgent	Correct Form	IX IX008102	Correct REJECTED IX IX008102 Form

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**.
2. Users may have **Approve Form**, **Correct Form**, or **Ad-Hoc Routing Task** records in their Inboxes.
3. Highlight the workflow task record, and then click **Open**.
4. 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.
5. If the ad-hoc routed item is a form, click **Correct** to open the form in edit mode.
6. 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.

7. **Approve Form** and **Correct Form** tasks will be removed automatically from the Inbox after the user has either approved or resubmitted the corrected form.
8. When tasks are completed, they are moved from the **Inbox** tab 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 Pegasys Hotline to have a new temporary password assigned.

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