

Introduction

With the upgrade to Pegasys 7.1.2, new features have been added. This card describes several of these enhancements.

Search Results

Many queries and search boxes within Pegasys display their results in an items collection table. Improvements include the ability to move and resize columns, sort search results based on multiple columns, arrange in sequence, view a larger volume of results, and export search results as CSV or Excel files.

Correct	View	Delete	Cancel	Reference Query	Amend/Modify
Route	GL Detail	Sort...	View as CSV	View as Excel	
Summary					
	Document Date	Document Type	Document Number	Document Status	
<input checked="" type="checkbox"/>	10/13/2014	CL	CL1911719	Processed	
<input type="checkbox"/>	10/08/2014	CL	CL1911712	Held	
<input type="checkbox"/>	10/08/2014	CL	CL1911713	Pending Approval	
<input type="checkbox"/>	10/06/2014	CL	CL1887009	Canceled	
<input type="checkbox"/>	10/03/2014	CL	CL1911718	Processed	
<input type="checkbox"/>	09/25/2014	CL	CL1911715	Rejected	
<input type="checkbox"/>	09/23/2014	CL	CL1911713	Processed	
<input type="checkbox"/>	09/22/2014	CL	CL1911710	Pending Approval	
<input type="checkbox"/>	09/22/2014	CL	CL1911711	Canceled	
<input type="checkbox"/>	09/22/2014	CL	CL1911712	Processed	
Page : 1 of 1 Show: 10					

Figure 1: Form/Document Search Results

Query & Reference Menus

Pegasys menu improvements include grouping items more logically and using submenus more often.

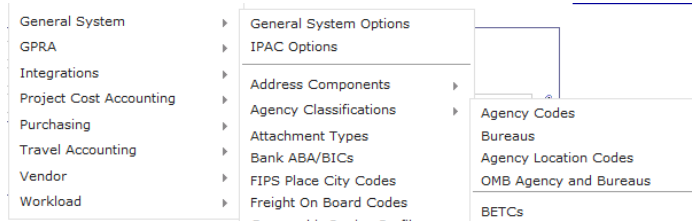


Figure 2: Reference Menu and Submenus

Auto-complete Usability Setting

As users begin to enter text in some of the more common data fields in Pegasys, the auto-complete usability setting will enable the system to display a list of possible values.

To enable/disable this setting:

1. Click the **Preferences** link and select the **Usability Settings** tab
2. Scroll down to the **Auto-complete** section.
3. Select:
 - o User-Initiated – use down arrow to trigger auto-complete
 - o Disabled – to turn off feature
 - o Enabled – to turn on feature



Figure 3: Auto-complete Setting

To use the auto-complete feature:

1. Enter the first few numbers or characters in a reference data field
2. Click the down arrow
3. Select the desired value

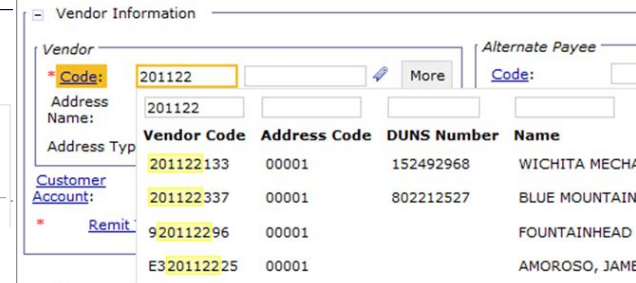


Figure 4: List of matching vendor codes

Reference Query Button

Pegasys users can now see from a processed transaction's Reference Query if there is an unprocessed form referencing it. They then have the option to view only processed documents.

1. Search and select a document
2. Select the **Reference Query** button

Correct	View	Delete	Cancel	Reference Query
Summary				
	Document Type	Document Number	Amendment/Number	
<input checked="" type="checkbox"/>	PJ	PJ3PB0443		

Figure 5: Sample processed document

3. Select the **Reference Query** button
4. Expand **Referencing** section

View Document	View Line Level Detail	View GL Detail	View Transaction Detail	View Processed Only
Summary				
Document	Doc Typ	Doc Num	Title	Status
o PBS 3-way Obligation	PJ	PJ3PB0443	TAR: Old Fort Hancock Station	Processed
▼ Referenced				
o Purchase Request	PR	PR2013073	TAR: Old Fort Hancock Station	Processed
▼ Referencing				
▶ Match Invoice 3-Way R7-VITAP	M7	M7E201403	PJ3PB0443	Processed
▶ Receipt6	RK	RK2014030	TAR: Old Fort Hancock Station	Processed
o Receipt6	RK	RK2014030	TAR: Old Fort Hancock Station	Held

Figure 6: Sample unprocessed document

The Reference Query button now displays related invoice numbers. It also shows payment documents related to Disbursement Cancellation documents.

Amendment Numbers

This enhancement changes the Amendment Number generation logic to increment the Amendment Number from the last saved form rather than from the last generated number.

New Amendment

Subsystem:

* **Document:**

* Document Type:

Document Name:

* Document Number:

Amendment Number

* Amendment Number:

The amendment number feature applies to billing documents and credit receipts.

Vendor Query

The Security Organization is not required when searching on the vendor code.

Search - Vendor Codes

Search Criteria

Code: Address Code:

DUNS Number: Address Type:

DUNS+4: Address Active Status:

CAGE Code: Region:

DODAAC: Region Number:

Name: Agency:

Legal Name: Bureau:

TIN: Agency Location Code:

Vendor Category: Security Organization:

Do Not Pay

The Do Not Pay Business Center was developed to support federal agencies in their efforts to reduce the number of improper payment. Do Not Pay is a one-stop shop that allows agencies to check various databases before making payments or awards in order to identify ineligible recipients and prevent fraud or errors from being made.

Vendors marked 'Do Not Pay' will prompt an overrideable error on new transactions.

Override

☐ Itemized Order/Address Code

AP2390W The vendor with Vendor Code 010687911, Address Code 00001 has been marked as Do Not Pay. Please review the vendor record and/or the Do Not Pay portal to view additional information regarding the vendor's Do Not Pay status.

Figure 7: Do Not Pay Error

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: New Features Quick Reference Card