

Introduction

Pegasys allows users to add attachments to most forms and documents. The attachment may be in a variety of formats , e.g., Word, PDF, Excel, etc. The attachment is uploaded using the steps outlined below. Once it is attached, it can be viewed by users with the proper credentials in Pegasys.

The following queries and notebooks also permit attachments:

1. Agreement Query
2. Project Notebook/Query
3. Initiative Notebook/Query
4. Planning Notebook/Query
5. Credit Card Reconciliation Notebook
6. Credit Card Log
7. Document Level Reorganization notebook
8. Global Level Reorganization Notebook
9. Blanket Agreement Query
10. Contract Query

Attach a Document

Attachments can be added to forms or documents. A processed document does not require a document to go through the approval process again when adding an attachment.

The screenshot shows the top navigation bar with buttons: Verify, Save, Submit, Schedule, Refresh, Add Shortcut, Attachments (1), Print, and Route. Below this is a 'Header' section with tabs: Approval Routing, Memos, and Lines. Under 'Memos', there are sub-tabs: Amendment History, Workflow Status, and Approval History. A link 'Expand All | Collapse All' is visible. The main content area is titled 'General' and contains a 'Setup Child' button, a 'Document Date:' link, a 'Document Type:' dropdown set to 'A5', a 'Status:' dropdown set to 'N-W', and a 'Document Number:' field with the value 'A520130128000'. There are also links for 'Accounting Period:', 'Reporting Accounting Pe', and 'Batch Number:'.

Figure 1: Attachments Button

1. Open an existing form and click the **Attachments** button

The screenshot shows the 'Import Local File' dialog box. It has a table with columns: Attachment Identifier, Name, Title, Number of Pages, Attachment, Sensitive, and CF. The table is currently empty, showing '- NO ITEMS TO DISPLAY -'. Below the table is a 'Document Information' section with fields: Attachment Identifier (required), Title (required), Location, Number of Pages, Attachment Date (required), Sensitive (checkbox), and Attachment (checkbox). There are 'Expand All | Collapse All' links above the section.

Figure 2: Import Local File Button

2. Click the **Import Local File** button
3. Enter a Title
4. Click the **Browse** button to find the document to attach

The screenshot shows the 'Browse' button in the 'Import Local File' dialog. The 'File' field is highlighted, showing the path 'C:\Users\dmcneil\Desktop\Infile\BUDGET.PROCESSED.txt'. The 'Browse' button is also highlighted.

Figure 3: Browse Button

5. Click the **Upload** button
6. On the budget form screen, the Attachment button will indicate the number of attachments

The screenshot shows the 'Attachments (1)' button in the top navigation bar. Below it, the 'Header' section is visible, showing tabs for Approval Routing, Memos, and Lines. The 'Memos' tab is selected, showing sub-tabs for Amendment History, Workflow Status, and Approval History. A link 'Expand All | Collapse All' is visible. The main content area is titled 'General' and contains a 'Setup Child' button, a 'Document Date:' link, a 'Document Type:' dropdown set to 'A5', a 'Status:' dropdown set to 'N-W', and a 'Document Number:' field with the value 'A520130128000'. There are also links for 'Accounting Period:', 'Reporting Accounting Pe', and 'Batch Number:'.

Figure 4: Attachments Buttons

Limit Access (Sensitive)

Note: The attached documents can be marked as “sensitive” which enables the system to restrict view, check in, check out, unlock, and delete access to designated users.

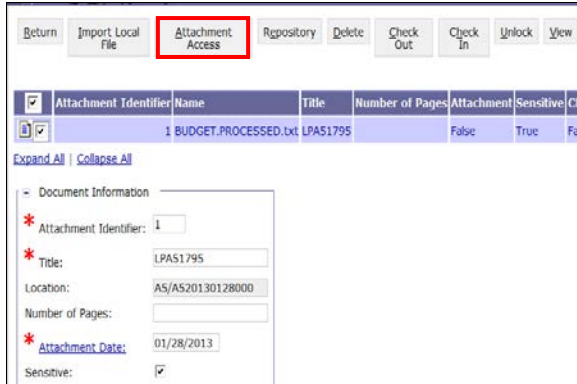
1. Click the **Sensitive** checkbox if you want to limit the document to only designated users. The user uploading the document is automatically granted Attachment Manager Permissions on the specific attachment and also receives the ability to view, edit, and delete the file. The Attachment Manager is able to grant view, edit, or delete access for the attached file to other users. The security settings are unrelated to other budget roles in Pegasys.

The screenshot shows the 'Sensitive' checkbox in the 'Import Local File' dialog. The 'Sensitive' checkbox is checked, and the 'Attachment' checkbox is also checked. The 'File' field is highlighted, showing the path 'C:\Users\dmcneil\Desktop\Infile\BUDGET.PROCESSED.txt'. The 'Browse' button is also highlighted.

Figure 5: Sensitive Check Box

2. Click the **Upload** button

3. If the Sensitive checkbox in the Upload Document screen was checked, click the **Attachment Access** button



The screenshot shows a web interface with a top navigation bar containing buttons: Return, Import Local File, Attachment Access (highlighted with a red box), Repository, Delete, Check Out, Check In, Unlock, and View. Below the navigation bar is a table with columns: Attachment Identifier, Name, Title, Number of Pages, Attachment, Sensitive, and Ch. The table contains one row with the following data: 1, BUDGET.PROCESSED.txt, LPA51795, False, True, and Fal. Below the table is a section titled 'Document Information' with fields for Attachment Identifier (1), Title (LPA51795), Location (AS/AS20130128000), Number of Pages, Attachment Date (01/28/2013), and Sensitive (checked).

Figure 6: Attachment Access Button

4. Click **Add** to add a user with attachment access
5. Enter or search for a **Principal ID** and check **View**, **Edit**, and **/or Delete** checkboxes
6. Click the **Previous** button to return to the **Attachment** screen.
Click the **Copy** button to copy the permissions for another user.
Click the **Remove** button to remove a user.
7. Click **Save**.
8. Click **Return** on **Attachments** screen to return to the form



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Pegasys 7.1.2: Attach Document Quick Reference Card