Introduction

- **PX** is a Memorandum of Understanding MOU or Inter-agency Agreement where obligations are incurred to procure goods or services between other federal agencies and GSA.
- **IX** is a MOU or Intra-agency Agreement where obligations are incurred to procure goods or services between GSA services.
- Commercial vendors should never be used with a MOU. A formal contract should be issued through Comprizon.
- Blue fields are mandatory for Pegasys processes, but may not include all fields required by GSA or PBS policy.

Recording an Obligation

1. Log into **Pegasys**.
2. Select **Transactions—Purchasing—New—Order** from the menu bar.
3. Enter
   - ***PX - Interagency Agreement or***
   - ***IX - Intraagency Agreement***

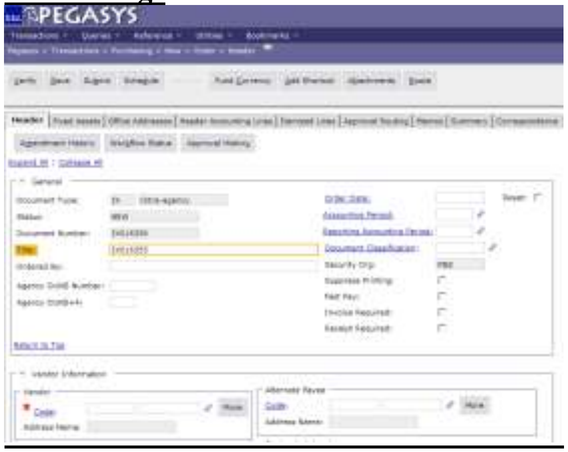
   In the **Document Type** field.

4. Pegasys generates a unique number in the **Document Number** field after clicking the **Generate** button.

- *Leave the **Security Org and Doc Number Prefix** fields blank.*

5. Enter the **Pegasys Document Number (PDN)** (the one that was just generated) in the **Title** Field.
6. Click **Finish**.

Header Page



7. Click **Code** in the **Vendor Info** section to search for a vendor. Enter applicable search criteria and click **Search**. Find the vendor and click **Select**.

- *The **Vendor Name** field will populate from the Vendor Code that is selected.*

8. In the **Remit To Address** field, enter the same vendor code that was input in the **Vendor** field (ex., if "00008" was selected in the **Vendor** address code field, enter "00008" in the **Remit to Address** field).
9. If appropriate, type a Contract Number in the **Contracts Number** field.
10. In the **Description** field, enter a brief description of the supply/services being ordered.
11. Select the **Office Addresses** tab.
12. The **Office Addresses** page displays
13. Select the appropriate **Office Type** and click the **Office Address** hyperlink. The specific Office Address page displays.

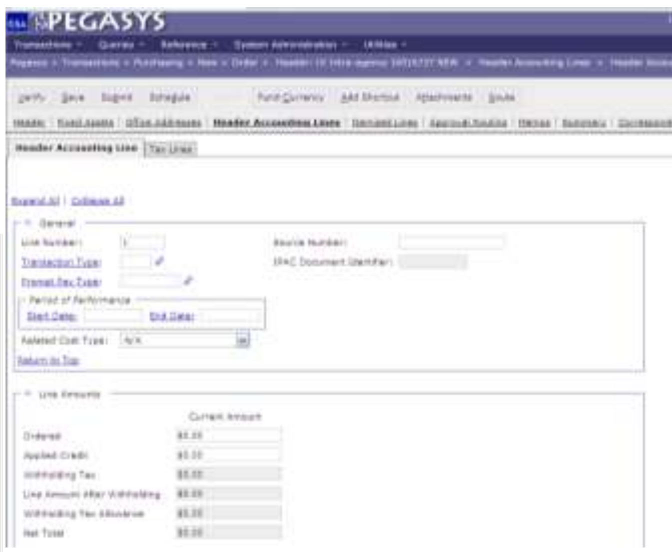
Note: The "**Invoice**" address is required for MOU documents.

14. Enter the appropriate address in the **Code** field.
15. Click the **Get Address** button to populate the fields in the **Address Information** section.
16. To return to the **Office Addresses** page click the **Office Addresses** hyperlink and repeat steps **12-15** as needed.

Office Addresses Page

17. Select the **Header Accounting Lines** tab.
18. The **Header Accounting Lines** page displays.
19. To add a line, click the **Add**.
20. To open an existing line, select the appropriate line and click the **Header Accounting Line** hyperlink.
21. The **Header Accounting Line** page displays.
22. Enter the appropriate value in the **Line Amounts** field.

Header Accounting Lines Page



23. Click the **Template** hyperlink (in the **Accounting Dimensions** group box) to search for a template. 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.
24. Click the **Default** button to populate the fields in the **Accounting** group box if you are using **Favorites**.
25. Complete any other required accounting elements that were not populated by the accounting template. (ex. Function Code, Cost Element, etc.).
26. Go to the **Description** field to view or enter descriptive information about this line.
27. Return to the **Header Accounting Lines** page by clicking the **Header Accounting Lines** hyperlink.
28. New lines can be created by clicking the **Add** button and repeating steps **22-26**.
29. Lines can be copied by selecting the appropriate line, clicking the **Copy** button and then clicking the **Header Accounting Line** hyperlink to open the new line to make needed changes.
30. Lines can be deleted by selecting the appropriate line and clicking the **Remove** button.
31. Click the **Approval Routing** tab and add the appropriate approvers individually or via a routing list.

Note: Approvals are required for IX and PX documents

32. Click the **Verify** button.
    - *Any errors will be displayed. If necessary, correct the errors and **Verify** again.*

33. Click the **Submit** button to submit the order form to standard workflow for approvals.

PBS Business Rules

- All MOU forms require a minimum of three approvals: Accounting Classification, Funds Authorization, and Manager.
- The **Requisitioner** role is required to have access to **PX** and **IX** documents.
- Any modification to **PX/IX** documents should be entered directly in Pegasys by the region.

Pegasys Resources

- **Functional Coordinator**
- **Service Representative**
- **Pegasys Web Site**
  pegasys.gsa.gov
  - **Reference**
  - **Tips**
  - **Help**
  - **Training**
- **Pegasys Hotline**
  1-800-805-3861

General Services Administration

The Integrated Financial Management System

Pegasys 6.5: Creating an Inter/Intra Agency Agreement (IX and PX) Quick Reference Card