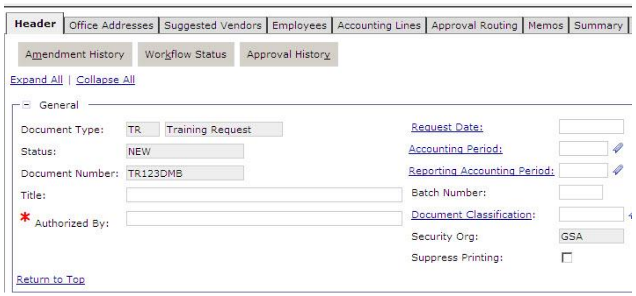
Introduction

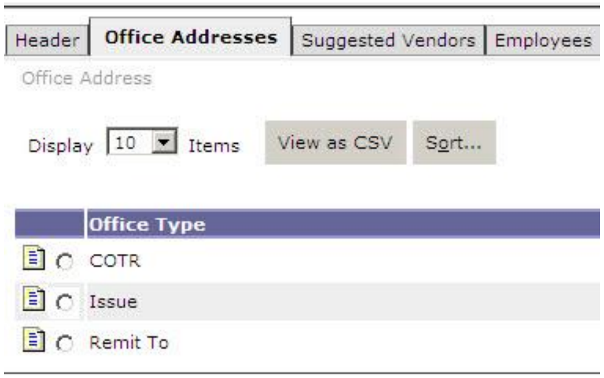
- The request records the intent to buy goods or services. While the request is not legally binding, it commits funds for a future purchase.
- Fields with red asterisks (*) are mandatory for Pegasys processes, but may not include all fields required by GSA policy.
- In Pegasys, users create one document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

Creating a Training Request

1. Log into **Pegasys**.
2. Select **Transactions—Purchasing—New—Training Request** from the Pegasys menu bar.
3. Enter **TR** (Training Request) into the **Document Type** field.
4. Pegasys generates a unique number in the **Document Number** field after you click **Generate**.
   - *Leave the Security Org and Document Title fields blank.*
5. Click Finish to display the Training Request's Header page. *The **Header Page** will be displayed.*



   - *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.
   - ***Reporting Acctg Period** will default to current, when the form is verified or processed.*
7. The **Date** fields will default to the current date when the form is verified or processed.
8. In the **Vendor Information** group box, enter the vendor's Taxpayer Identification Number (TIN) and address code into the **Code** fields (if applicable).Enter any other relevant information.
9. In the **Contracts** group box specify the information from a contract or delivery order (if applicable).
10. Select the **Suggested Vendors** tab.
    - *Add a new line by clicking the **Add** button.*
    - *Once a line has been created, the line may be modified by selecting the line on the **Suggested Vendors** page, clicking the **Suggested Vendors** link and making the appropriate changes.*
11. Select the Office Addresses tab. *The **Office Addresses** page will be displayed.*



12. Select the appropriate **Office Type** to enter the Requesting and Issuing office (procurement office) address information. A COTR address may also be added. Click the **Office Address** link.
13. Enter the appropriate address code in the **Code** field. Click **Get Address** to populate the fields in the Address Information section.
14. Select the Course Information link. *The **Course Information** page will be displayed.*

15. In the **General** group box, enter the **Course** and **Title**. Enter the **Program Office** and **Class Sequence** (if known).
16. In the **Course Dates** group box, enter the **Start Date** and **End Date** for the training course. Enter a **Drop Date** for the course if one exists.
17. In the **Course Hours** group box, enter the number of both **During Duty** and **Non-Duty** course hours.
18. In the **Training Address** group box, enter the **Training address** or check the **Address Same As Vendor** checkbox.
19. In the **Objective and Benefits** text box, enter the objective and benefits of the training course.
20. Select the Employees tab to enter the names of employees who will attend the training class. *The **Employees** page will be displayed.*

    - *After clicking the Add button enter the appropriate information in the Search criteria group box, click Search and select the appropriate employee from the generated list.*
21. Choose an employee from the **Employees** Search screen and click **Select**
22. Select the **Accounting Lines** tab. *The **Accounting Line** page will display.*

23. Click **Add** to add a new accounting line
24. In the **Period of Performance** group box, enter the **Start Date** and **End Date** (if applicable).
25. In the Line Amounts group box, enter the **Requested** field
26. In the **Accounting Dimensions** group box, enter an accounting template for the accounting line. Make sure all required fields are filled.
27. In the **Agreement** group box enter referenced RWA or IBAA Agreement information (PBS only).
28. Use the **Contract Line Info** group box if the request is to be associated with an existing contract.
29. To view a summary of the header accounting lines or make changes to the header accounting lines, click the **Summary** tab.
30. Click the **Approval Routing** tab and add the appropriate approvers individually or via a routing list.
31. Click **Verify**. *Any errors will be displayed. If necessary, correct the errors and click* ***Verify*** *again.*
32. Click **Submit** to submit the request for approval.

GSA Policy

- All requests require **Accounting Classification, Funds Authorization**, **Manager,** and **Training Coordinator** 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 in the on the **Delivery** office address type 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 Training Request Quick Reference Card

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