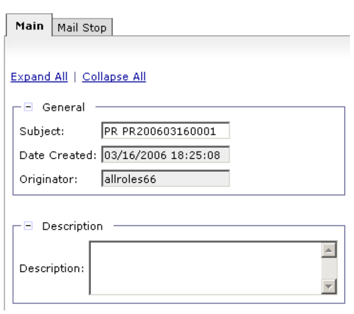
Introduction

The following steps describe how to route forms and documents, create custom routing lists, and edit an existing routing list. Fields with red asterisks (*) are mandatory for Pegasys processes. For detailed information on routing, please refer to the Desktop chapter of the User Guides.

Routing Forms and Documents

Users can send forms or documents to other Pegasys users for correction or review.

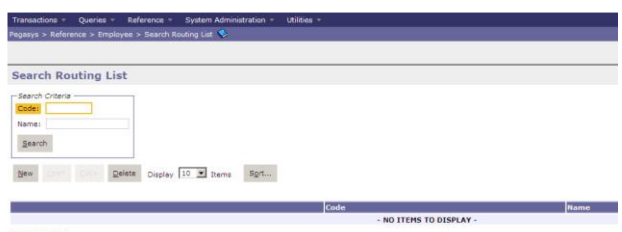
1. Log into **Pegasys**.
2. Select **Transactions-Form/Document Selection**.
3. The **Form/Document Selection** page displays.
4. Search for a previously saved form or processed document by entering the appropriate data in the **Search Criteria** fields.
5. Click **Search**.
6. Select the appropriate record from the generated list.
7. Click **Route**.
   - *Note: On a new form, click the **Save** button. Forms must first be saved successfully before users may route them to others for review.*
   - *The **Main** page displays.*



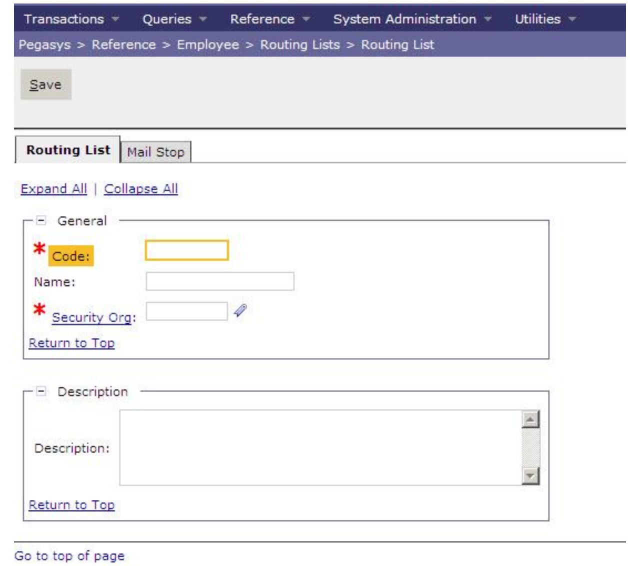
8. Edit the **Subject** and **Description** fields, as necessary.
   - *Information entered in the Description field will appear in the Inbox's Description field.*
9. Click the **Mail Stop** tab.
10. Click **Add/User Group** to individually select recipients of the routed item.
11. Enter your search criteria in the appropriate fields. Click **Search.**
12. Highlight the record for the recipient of the form or document. Click **Select**.
13. The selected user will be added to the list of recipients on the **Mail Stop** page.
14. To select multiple recipients saved in a routing list, click **Add Routing List**.
15. Repeat steps **11-13** to search for and select a routing list.
16. The users saved in the routing list will be added to the list of recipients on the **Mail Stop** page.
17. Review the list of recipients and click **Previous**.
    - *The form or document will be sent to the recipients in the order listed on the **Mail Stops** page.*
18. Click **Send**.

Creating a New Routing List

1. Select **Reference—Employee—Routing Lists** from the menu bar.
2. The **Search Routing List** page displays.



3. Click **New**
   - *The Routing List page displays.*



4. Enter your Correspondence Symbol followed by a brief description of the routing list in the **Code** field (*e.g.*, 4BE Trng).
   - *The **Code** field cannot exceed 10 characters.*
5. Enter a name that describes the routing list in the **Name** field.
6. Click the **Security Org** reference field hyperlink.
7. Enter your search criteria in the appropriate fields. Click **Search**.
8. Highlight the security organization record and click **Select**.
   - *Select the **GSA** security organization to make the routing list available to all employees.*
9. Click the **Mail Stop** tab.
10. The **Mail Stop** page displays.
11. Click **Add**.
12. Enter your search criteria in the appropriate fields. Click **Search**.
13. Highlight the record for one of the routing list addressees. Click **Select.**
14. The selected user will be added to the list of addressees on the **Mail Stop** page.
15. Review the list of addressees.

- *The form or document will be sent to the addresses in the order listed on the **Mail Stops** page.*

16. Click **Save.**

17. Click the **Inbox** link to return to your inbox.

Editing an Existing Routing List

1. To make changes to a previously created Routing List, select **Reference—Employee—Routing Lists** from the menu bar.

2. The **Search Routing List** page displays.

3. Enter your search criteria in the appropriate fields. Click **Search**.

4. Select the desired routing list code from the generated list.

5. Click **Open**.

6. The **Routing List** page displays.

7. Click the **Mail Stop** tab.

8. The **Mail Stop** page displays.

9. Highlight the desired addressee. Click **Move Up** or **Move Down** to move the addressee up or down one position. Or click **Delete** to remove an addressee. To add an addressee to the routing list, follow **Steps 11-15** in the previous section.

10. Click **Save** at the top of the page to save changes.

11. Click the **Inbox** hyperlink to return to your inbox.

GSA Policy

- The naming convention for Routing Lists will be the user's Correspondence Symbol, followed by a brief description of the routing list. For example, the naming convention on a routing list for training orders might be 4BE Trng.
- An addressee will receive an e-mail notification when a workflow task is received in the addressee's Pegasys Inbox.
  - The user's e-mail address is saved in System Administration.
  - If a form has been routed to you and you don't see the workflow task in your **Inbox**, click the **Refresh** button.

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: Route Forms and Creating Custom Routing Lists Quick Reference Card

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