

Introduction

With the upgrade to Pegasys 6.5.0, new features have been added. This card describes several of the new features.

Expanded Menu Bar

Inbox | Preferences | Shortcuts | Site Map | Help | About |
Welcome Bridget R. Jones | November 18, 2010 | Sign Out

On the right side of the Pegasys home page, the menu bar displays a welcome message with the current user's name and the current date.

User Preferences

Inbox | Preferences | Shortcuts | Site Map | Help | About |
Welcome Bridget R. Jones | November 18, 2010 | Sign Out

Users can configure the overall appearance of Pegasys, navigation options, and security features by selecting **Preferences** from the Menu Bar.

- **Styles** - Allows users to choose between the Default and Simple themes.

Styles | Bookmarks | Advanced Options

Save

[Expand All](#) | [Collapse All](#)

Themes ⓘ

* Choose a Theme: Default

[Return to Top](#)

- **Usability Settings** - Allows users to select whether menus and submenus display by clicking on them or hovering over them.

Navigation Menu ⓘ

Require click to show/hide menus: ☒

Require click to show/hide submenus: ☒

Menu display delay: Medium Delay (default)

Enable Keyboard Accessibility: ☒

[Return to Top](#)

- **User Information**—Allows users to change their current passwords.
- **Security Question and Answer Page** – Allows users to select a question and answer to be used for forgotten password reset.

Credit Card Usability

Pegasys 6.5.0 integrates the majority of the reconciliation functionality onto one main page reducing the amount of user navigation and providing a more efficient credit card process. The improved credit card reconciliation notebook includes the following features:

- A Clear button, which allows users to clear previous search results.
- The ability to drag columns to a desired location as well as expand and contract the column width in each section of the Credit Card Reconciliation screen.
- A new Reconciliation Activity section which displays a summary of reconciliation activity information when a statement line or series of statement lines are selected.

View | Unreconcile | Retrieve | Sgtr... | View as CSV

Reconciliation Activity					
	Alias	Reconciliation Lin	Status	Reconciliation Da	Reconciled Amou
<input checked="" type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$0.00
<input type="checkbox"/>	JENNIFERLUU29123		Reconciled	11/23/2010	\$1,000.00
<input type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$0.00
<input type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$1,125.00
<input type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$0.00
<input type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$179.30
<input type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$0.00
<input type="checkbox"/>	JENNIFERLUU29122		Defaulted		\$87.83
<input type="checkbox"/>	JENNIFERLUU29122		Paid		\$600.00

- A Filter button, which allows users to filter search results on both the Statement Activity and Transaction/Accounting sections.

Statement Activity

Search Statement Lines

Search Criteria

Credit Card: AUTO_FACC_ALIAS2 JACKADARLING2408 JENNIFERLUU29122 MARJORIEAMIL0329

Approval Group:

Charge Date: Value:

Charge Amount: Value:

Reconciled Amount: Value:

Unreconciled Amount: Value:

Disputed Amount: Value:

Vendor: Name: City: State: Zip:

Card Status: Active

In Dispute:

Charge/Credit:

Search | Clear

Refer to the Credit Card User guide for detailed information.

Enhanced Query Capabilities

Pegasys 6.5.0 presents a new style for the search results which is available on the Vendor Activity and Review Vendor Queries, the Accounting Summary Page, and the Credit Card Reconciliation page.

- **Sort** – Users can arrange query results based on multiple fields.
- **Column Sequence** – Users can click and drag to rearrange columns as well as increase/decrease the column width.

Details More Sgtr... View as CSV

Summary		
Vendor Codes	Address Code	Name
<input checked="" type="checkbox"/> 480882965	00001	GENERAL AUTOMATIC
<input type="checkbox"/> 480882965	00001	GENERAL AUTOMATIC

- **More** - Users can view vendor record details at a glance without opening the record.

Detail Section

Item: 4 >

Standardized Format: Yes Address Active Status: Active

Name: STAPLES AND CHARLE State: VA

Address: 220 QUEEN STREET Postal Code: 22314

Country: Currency Code: USD

Prevent New Spending: No

CCR Enabled: No

City: ALEXANDRIA

County:

Vendor Query

Vendor Queries – Pegasys 6.5.0 has modified vendor queries to include additional search criteria and to display additional results. The new search criteria fields include Agency Location Code, CCR Enabled, Vendor Address Active Status, Prevent New Spending, and Currency Code. The search results will display expanded information such as Vendor Address Line information, CCR status, Vendor Address Active, Prevent New Spending, and Currency Code.

Vendor Query

Search Criteria

Code: Address Code:

DUNS Number: Address Type:

DUNS+4: Address Active Status:

CAGE Code: Region:

Name: Region Number:

Legal Name: Agency:

SSN/EIN: Bureau:

Vendor Category: Agency Location Code:

Vendor Class: Security Organization: GSA

Vendor Group: Use For Payments:

Vendor Type: Use For Billing:

Default Payment Type: Use For Procurement:

Reporting Attribute: Prevent New Spending:

Currency Code: 1099 Vendor:

Miscellaneous:

CCR Enabled:

NAICS

NAICS Code:

Small Business (by NAICS):

Emerging Small Business (by NAICS):

Accounting Summary Page

Pegasys 6.5.0 has added a new “Summary” tab to all documents with header and itemized lines which provide an enhanced summary view of the transaction’s accounting lines. This tab allows users to view accounting information at a glance, make changes to existing lines, and add new header or itemized lines such that data-entry resembles entry of information in cells within a spreadsheet application

Header	Fixed Assets	Office Addresses	Header Accounting Lines	Itemized Lines	Approval Routing	Memos	Summary
Add	Copy	Remove	Details	Default Accounting Template	Default from Referenced Line	Sgtr...	View as C
Header Accounting Lines							
Line Number	Total Ordered Am	Net Total Amount	Template	Fund	Transaction Type	So	
1	\$50.00	\$50.00	10-206X-D0000000-GX00-G 206X	01			
2	\$50.00	\$50.00	10-206X-D0000000-GX00-G 206X	01			
3	\$50.00	\$50.00	10-206X-D0000000-GX00-G 206X	01			
4	\$50.00	\$50.00	10-206X-D0000000-GX00-G 206X	01			

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: New Features Quick Reference Card