

# WORKS

Training for p card holders

# Getting Started in Works

You will receive an email to set up your works login

Use your email to begin the login process

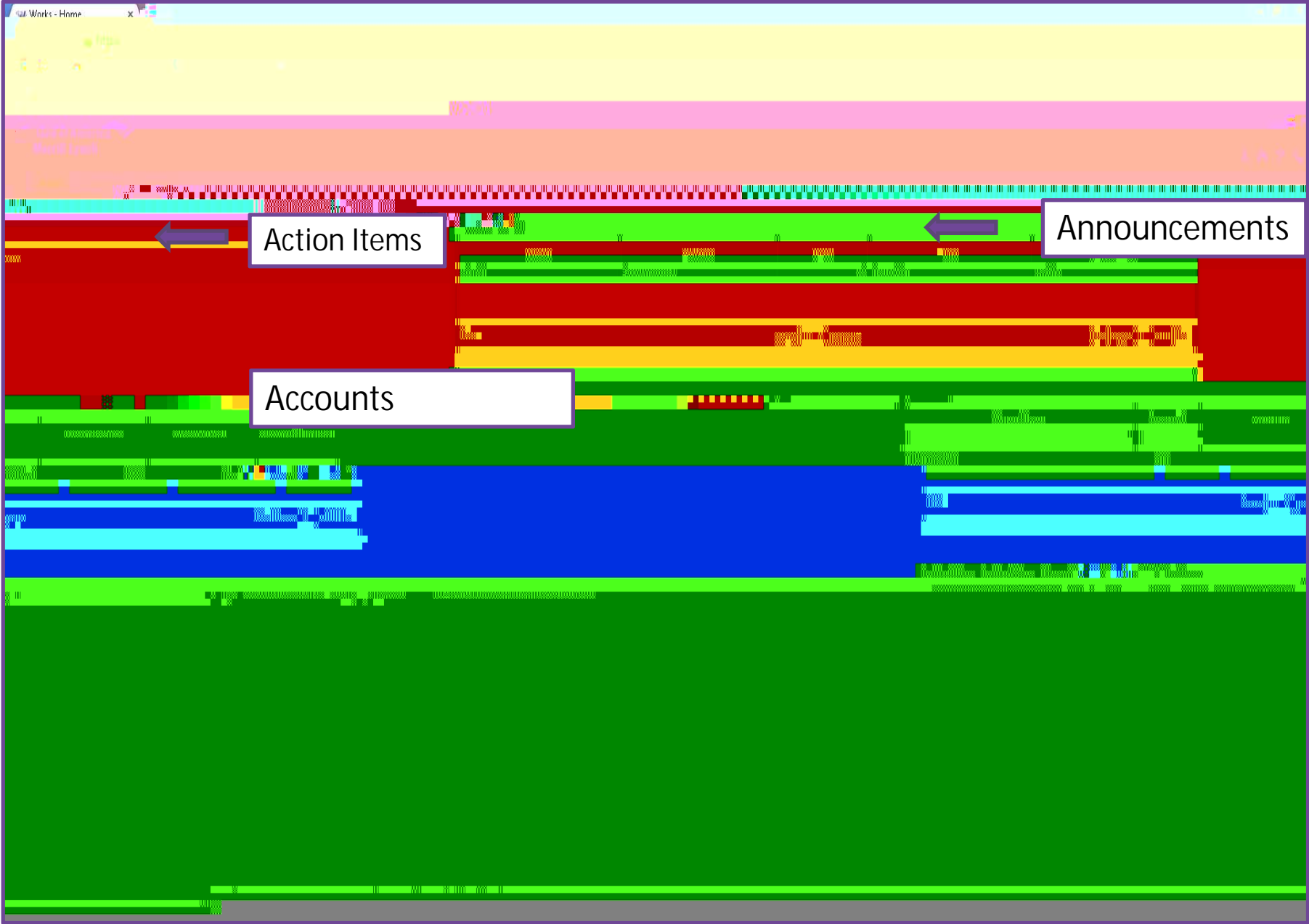
Set up password & security questions

# Login and Home screen of Works

Link to WORKS it will be available on your "Task to Perform" Email

Use the information from your welcome email, if this is your first time logging in. If you do not remember your login or password please contact Purchasing to reset.

You will receive a 'Task to Perform' email when you have transaction to sign off. But do not solely rely on these emails. Make sure to sign off on your transactions once a week.

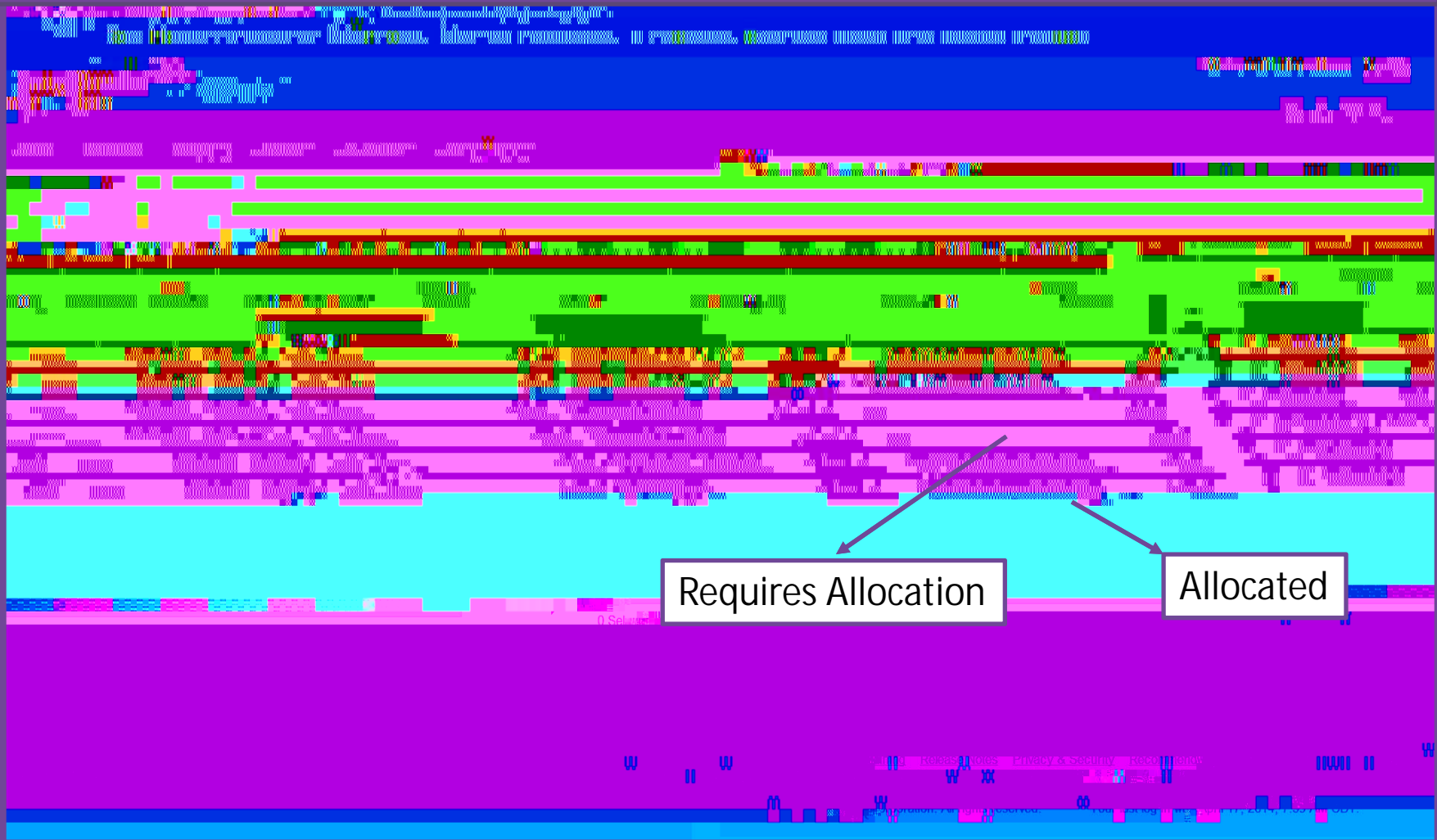


Action Items

Announcements

Accounts

# Allocation of Transactions



This is a screen shot of a p card holders transactions that require sign off. Note that not all transactions have been allocated yet. You need three green check marks before you can sign off.

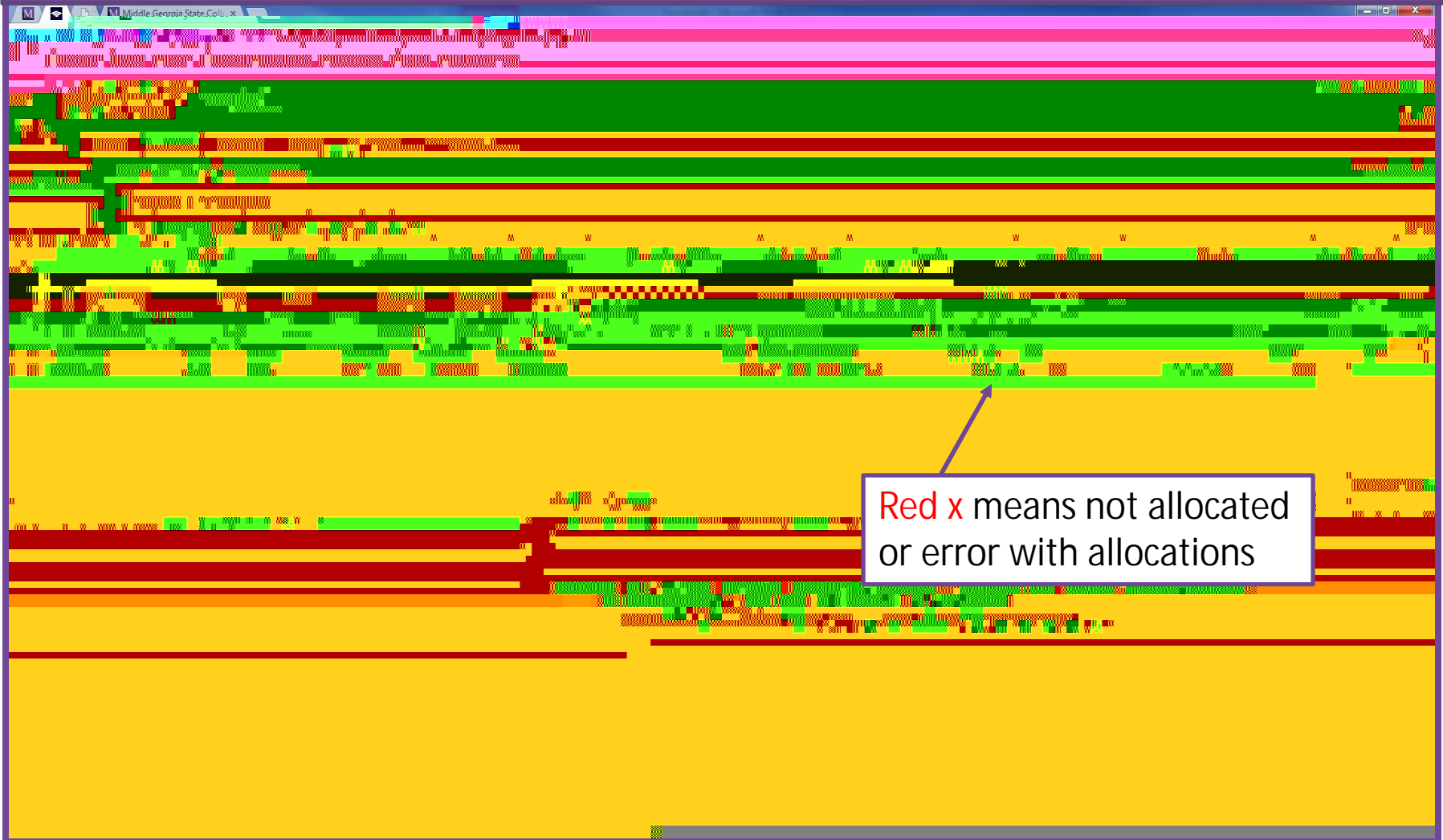
# Allocation

The screenshot displays a software interface with a list of transactions. The interface is cluttered with various colored bars and text. A white text box with a black border is overlaid on the screen, containing two lines of text: "To allocate – click the transaction number" and "Then click allocate/edit". Two blue arrows originate from the text box: one points to a specific transaction number in the list, and the other points to a button labeled "allocate/edit" located to the right of the list.

To allocate – click the transaction number

Then click allocate/edit

# Allocation



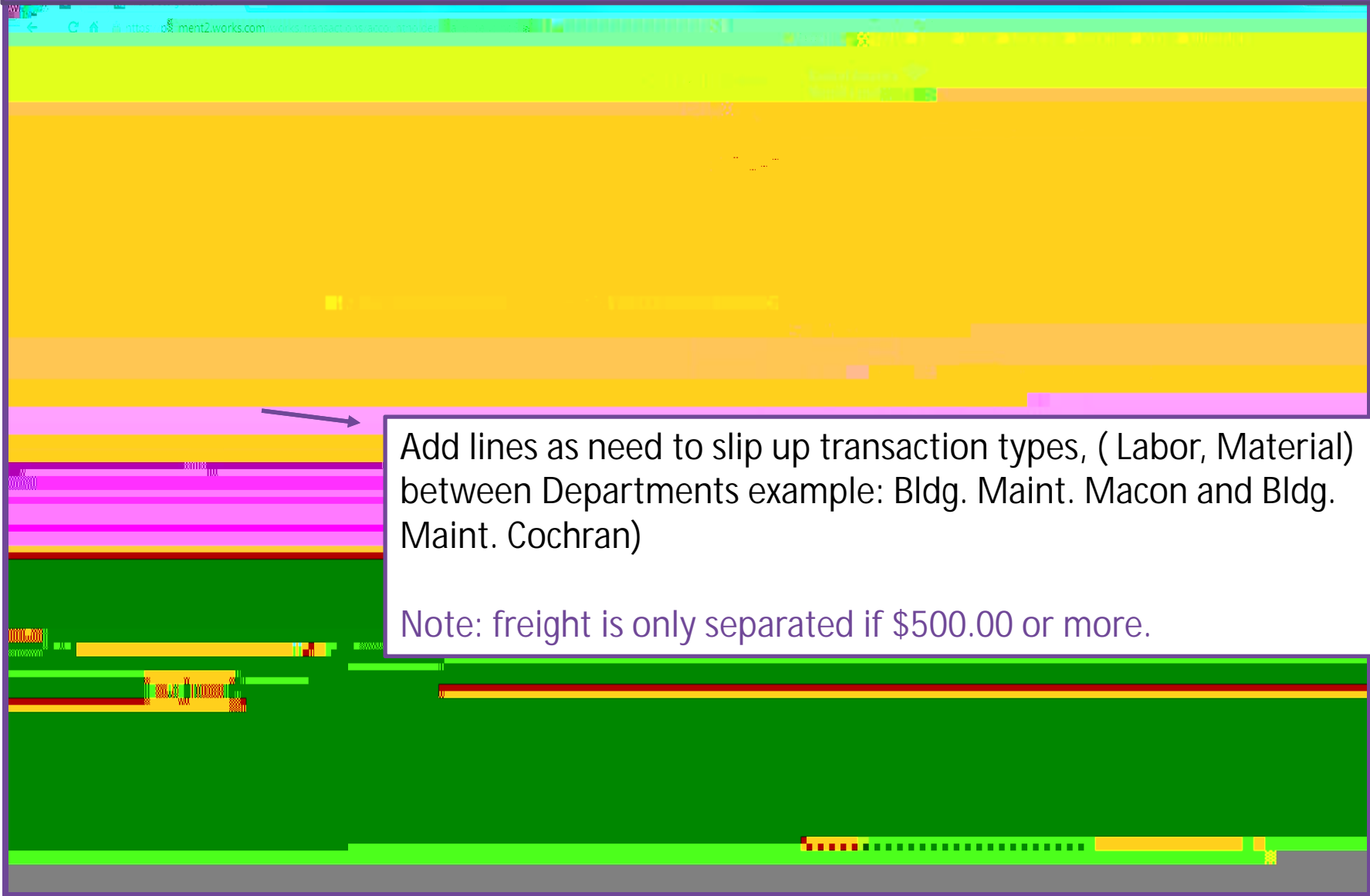
Red x means not allocated or error with allocations

# Allocation

The screenshot shows a web browser window with the URL <https://payment2.works.com/works/transactions/accountholder/tab/bendnd5onOff>. The interface is a complex grid of data with various colored headers and rows. A white text box with a black border is overlaid on the right side of the grid, containing the text: "Allocate each column ( Dept. Id., Fund, Program, Class. Expense, Project/Grants)". A purple arrow points from the text box to a specific column in the grid.



# Allocation



Add lines as need to slip up transaction types, ( Labor, Material) between Departments example: Bldg. Maint. Macon and Bldg. Maint. Cochran)

Note: freight is only separated if \$500.00 or more.



# Comments

Another example for comments.

Do not use 'approved', 'signed off' or 'ok to pay'. Comments should describe what has been purchased and for whom.





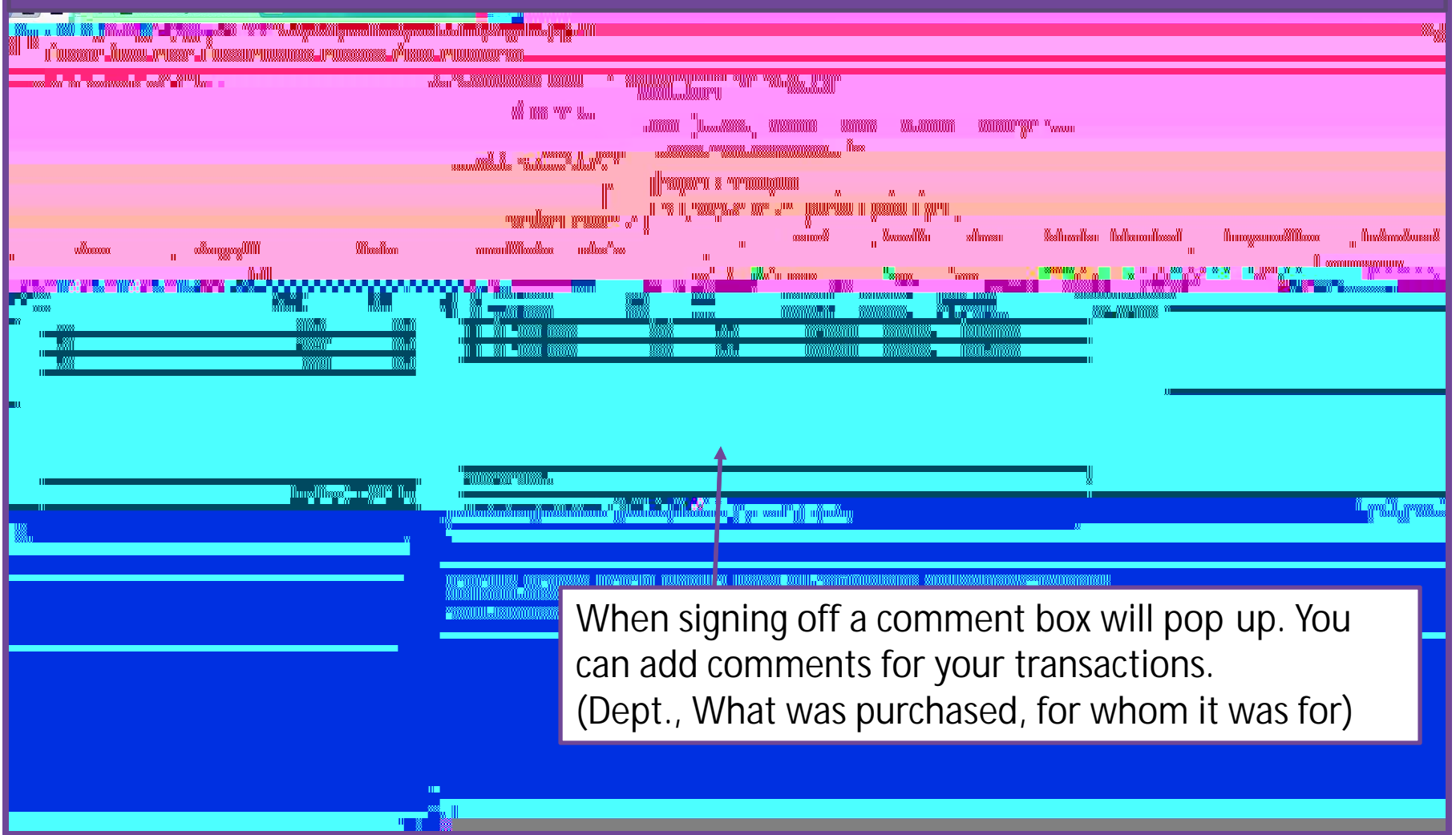
# n Transactions



Note that Column Comp | Val | Auth has all Green

%A Comp | 0x878 (s.3.2) (11.08) | 0x2052711 | 0.01mp\$

# Sign off on Transactions



When signing off a comment box will pop up. You can add comments for your transactions. (Dept., What was purchased, for whom it was for)

Do not use 'approved', 'signed off' or 'ok'

# Questions ?

Questions or Issues contact

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