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

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.

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

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** is where you will see transactions that need allocation and signing off.

**Accounts Dashboard** is where you will see card information - balance, current balance, available credit.

**Announcements** will have the last new and updates for Works only.

Click on the link. This is where you will find the transaction that requires Sign-off.
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.
To allocate – click the transaction number

Then - click allocate/edit
Allocation

Red x means not allocated or error with allocations.
Allocate each column (Dept. Id., Fund, Program, Class, Expense, Project/Grants)
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.
Click here to add comments or add them at sign-off

Example for comments
Detailed information

Click save
Another example for comments.

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

Green ✓ means correctly allocated

You can scroll here to see the complete chart field string

Make sure no tax shows here. Zero out the amount if it shows tax. Obtain a credit immediately if it is a true tax charge. The credit you obtain will be automatically applied to the Goods and Services and not to the taxes.

Note: sometimes taxes will show up in amounts of $.03 or $.01 but will not be on your receipt. Please do not worry this is an issue that happen time to time with some vendors; just clear the taxes to show zero.
Some suppliers (most Statewide contract suppliers) will provide detailed information on what was purchased. You still have to add a comment.
Sign-off on Transactions

Check the box to the left for sign-off on the transactions.

Click Sign-off button

Note that Column Comp|Val|Auth has all Green ✓ marks. This means that you have allocated correctly and can sign off on the transactions.
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 to pay’. Comments should describe what has been purchased and for whom.
Questions or Issues contact

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