KENNESAW STATE
U N I V E R S I T Y
OFFICE OF FISCAL SERVICES

Job Aid PC4

Approver Sign-Off Instructions for Works® Transactions

https://payment2.works.com/works

1. Log into **WORKS®**

2. Under the **"Home"** tab see **Action Items > "Sign Off"** then under **"Current Status"**, select **Pending** to see the transactions that require your approval. *Please search only for your Cardholder's transactions.*

3. Hover mouse over **TXN**00xxxxxx for dropdown arrow then click the "Down Arrow".

4. Select **"Allocate / Edit."** From this view (the upper section), you will see the chart string where the charge was allocated and you may make changes as necessary to any of the GL Segment Values (Fund, Dept., Program, Class, Project/Grant, if applicable, and Account). Near the bottom right you will see the **"Comments"** entered by the Cardholder that provide justification for the purchase.

5. After changes have been made, if applicable or if no changes are needed, select **"Save" then "Close,"** and the system will automatically take you back to the **"Pending Sign Off"** tab. Here you should see (3) green check marks beside the transaction under "**Comp/Val/Auth."** If there are any red X's, this indicates an incorrect chart string.

6. To approve/sign off, at the **"Pending Sign Off"**, hover your mouse over the transaction and at the drop down, select **"Sign Off,"** then enter any "**Comments"** you would like to make, i.e. "Approved, your initials and date" then select **"OK"** button.

7. Once you have approved/signed off, the transaction will no longer be viewable in the **"Home"** tab. Should you need to make additional changes, email the P-Card Administrator with the Transaction Number, Vendor Name and Purchase Amount to request to have the transaction **"flagged."** The transaction will return to the cardholder to make the required changes and will again sign off by selecting **"Remove Flag"** and will enter another comment that explains the change(s). The transaction will then show up again for your approval/sign off.

   At **"Action Items"**, **"Current Status"** select **"Flagged"**, this will bring up the transaction then hover your mouse over TXNxxxxxxxx and click **"Allocate/Edit"**, make changes as needed then **"Save" and "Close".** Hover again over the TXNXXXXXXXX and Select **"Remove Flag"** and add "Comment(s)" and click **"OK".**