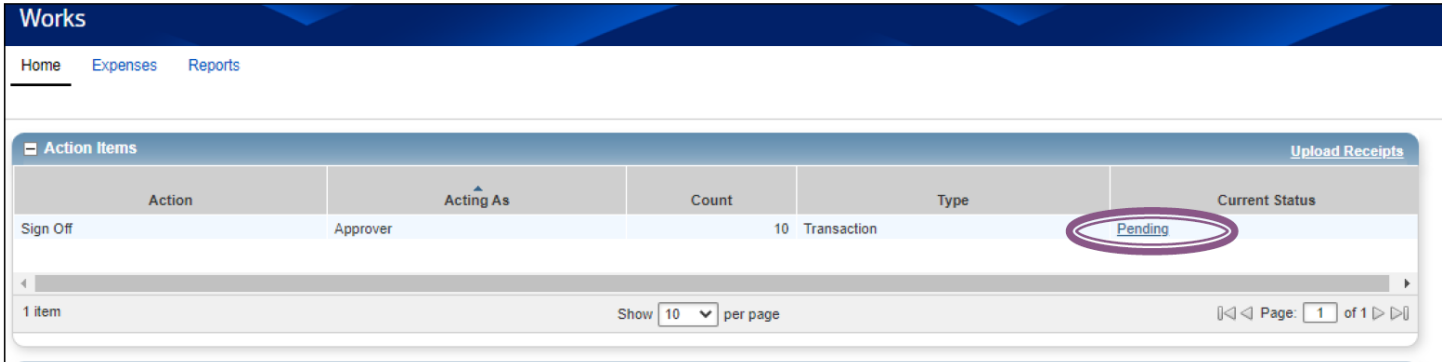


## Group Approver Instructions for Works website (<https://payment2.works.com/works/>)

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### Viewing Summary and Full Transaction Details

As an Approver, to view summary or full transaction details, including allocation, purchase details, you can click on "Pending" on the home screen:



The screenshot shows the 'Works' website interface. At the top, there are navigation tabs for 'Home', 'Expenses', and 'Reports'. Below this is a section titled 'Action Items' with a sub-header 'Upload Receipts'. A table displays the following data:

Action	Acting As	Count	Type	Current Status
Sign Off	Approver	10	Transaction	Pending

At the bottom of the table, there is a pagination control showing '1 item', 'Show 10 per page', and 'Page: 1 of 1'.

Or complete the following:

1. Click **Expenses > Transactions > Approver**. The Transactions screen with transactions in the Pending Sign Off queue displays.
2. Click the expand icon next to a desired transaction to view general summary details.
3. Select **View Full Details** to view the Transaction Details screen. The Transaction Details screen displays.

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### Flagging Transactions

Approvers can flag a transaction to alert members of their group there is an issue with the transaction or if additional information is needed. Flagging does not prevent you from signing-off on a transaction. However, you must flag a transaction before you sign-off the transaction.

To flag one or more transactions, complete the following:

1. Click **Expenses > Transactions > Approver**. The Transactions screen with transactions in the Pending Sign Off queue displays.
  2. Select the check box for each desired transaction.
  3. Click **Flag**.
  4. Select **Raise Flag**. (Select **Remove Flag** to remove a flag.) The Confirm Flag window displays.
  5. Enter **Comments**.  
**Note:** Comments are required.
  6. Click **OK**. A confirmation message displays.
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## Viewing Receipts and Signing-off on Transactions

Approvers are responsible for signing-off on posted transactions that were made by members of their groups.

1. Click **Expenses > Transactions > Approver**. The Transactions screen with transactions in the Pending Sign Off queue displays.
2. Select the check box for each desired **Transaction**.
3. Hover mouse over Transaction number (TXN00....)
4. Click on down arrow and choose **Manage Receipt**.
5. Click on **View PDF** to view attached receipt. Click **Close**.
6. Click **Sign Off**.
7. Click **OK**. A confirmation message displays.

Note: #'s 3 through 5 are optional if you don't need to view receipts attached to transactions.

After you sign off on a transaction, you can no longer make any changes to the transaction. If actions need to be taken on a transaction after signing off, an Accountant must perform those actions in Works.

2/28/23