Works User Interface

A Guide for Approvers
Bank of America Works™
Overview

Signing On

1. Go to the following web address: https://payment2.works.com/works

2. Bookmark the login screen once it appears on your desktop, for ease of access in the future.

3. Complete the Login Name and Password fields with your current login/password to login to the listed Organization

Link to Training Videos:
http://training.works.com/support/training.html?9474b4356e96b146ee58e6d7f181c5b9~0~cce3df80f07d36b56db4376a4802d6c2~5109d85d95fece7816d9704e6e5b1279.
Step 1

Under the Action Items, click the Pending link next to the Sign Off-Approver line.

Step 2

Hover over a transaction number to display the black arrow for the drop down menu. Click on the arrow to display the menu.
Step 3

Click on View Full Details to review the transaction. Also in this screen, you can click on the Allocation & Detail tab to review the PC#/CFC.

After clicking View Full Details you will see the transaction detail including vendor, purchase amount, and comments detailing the purchase.
Step 4
After reviewing the transaction detail click on the Allocation & Detail tab to review that the correct PC#/CFC has been allocated to the transaction. If the allocation is incorrect, you can flag the transaction and send it back to the cardholder. * Flagging steps shown later.

Step 5
To Sign Off on the transaction click the Actions drop down on the top right to display the Sign Off and the Raise Flag buttons.
Step 6
Click Sign Off to approve the transaction.

Comments are required of the cardholder not the approver.
After having signed off, the Signed off transaction will be displayed at the top of the screen.

![Signed off 1 transaction. View Details](Image)

This completes the Sign Off of a transaction.

**Raising a Flag**

**Procedure**

On the Actions drop down, top right of the transaction screen, click “Raise Flag”. Raising a flag is essentially sending the transaction back to the cardholder for further review. The flag can be removed by the cardholder or the approver at any time but the transaction will remain in the approver’s queue until signed off.
This will prompt for a comment to the cardholder. Once complete, click OK to send to cardholder. You can review flagged items in the Flagged tab of the main Transaction-Approver screen.

This completes the procedure.
Removing a Flag

Procedure

To remove a flag, complete the following:

1. Click Expenses > Transactions > Accountholder. The Pending Sign Off screen displays by default.
2. Click Flagged. The Flagged screen displays the transactions with a flagged status (Figure 1).
3. Select the check box for each desired Document. The action buttons become enabled.
4. Click Remove Flag. The Confirm Remove Flag window displays.
5. Enter Comments, if desired.
6. Click OK. The Flagged screen displays a confirmation message, and the transaction no longer displays on the Flagged screen.

This completes the procedure.
Mass Sign Off

To Sign off on more than one transaction, complete the following:

1. Go the Pending Sign Off screen.
2. Select the check box at the top left to select all. Then click the sign off button.

This completes the mass sign off.