

(For use in accordance with [Purchasing Card Procedures](#) Policy)



Purchasing Card Procedures

INSTRUCTIONS ON ENTERING PURCHASE REQUISITIONS IN “WORKS” PROGRAM

An open, approved purchase request is required before a card can be used to make a purchase. At the beginning of each quarter, the cardholder or proxy must enter a new request which will be reviewed and approved (or adjusted or disallowed) by the Director of Budget and Finance.

1. On Works homepage, click Create: Purchase Request: GO
2. Enter purchase request name (for example, Smith 4Q-FY11)
3. Choose cardholder that purchase request is for (if not you)
4. Enter description (for example, 4th Quarter Purchases) in the Goods/Services section
5. Enter amount that you would like approval for in the Goods/Services section
6. Unclick “Do not expire this request” statement
7. Enter expiration date based on time of fiscal year:
 - a. July through September, 1st Quarter – September 30th
 - b. October through December, 2nd Quarter – December 31st
 - c. January through March, 3rd Quarter – March 31st
 - d. April through June, 4th Quarter – June 30th
8. Click Submit
9. Cardholders and/or group proxies can view pending and approved requests on the Works homepage.

Approved 1/11/11