WORKS REPORTING

Transaction Signoff History

1. Log into WORKS and go to Reports > Create

2. Category = Spend
   Template = Choose from all available templates
   Template Name = Great Plains Report Test 1

3. Under Filters, update your post date by clicking on the calendar icon, input your date range, then click Go

4. Under Output Format, ensure that Excel and Full Details are checked

5. Scroll down and click on Submit Report

6. When your report is ready, click on XLS to view your report in excel. If any columns listed below are blank, the appropriate person has not signed off on the transaction:

   - Column I – Accountholder Signoff Date
   - Column J – Budget Unit Manager Signoff Date
   - Column K – Accountant (AP) Signoff Date