

Works™ Workshops

The Works workshops allow you to obtain a complete comprehension of the Works application and learn how to utilize the available functions. The following is a list of the available Works workshops:

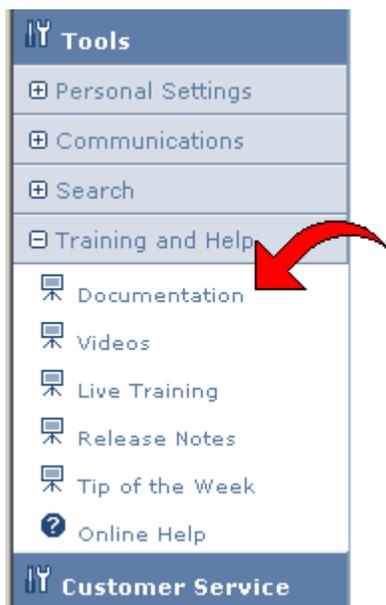
- [Administrators: Creating Users and Groups](#)
 - This workshop provides the information needed to learn how to create and maintain users and groups in Works.
 - Note: The Works application is designed based on the hierarchy built by users and groups.
- [Administrators: Creating your Card Program](#)
 - This workshop provides the information needed to create and maintain card requests, rules, and profiles.
- [Administrators: Understanding Cardholder and Approver Workflows](#)
 - This workshop provides the information needed to manage and educate cardholders and managers.
 - Details functionality to reconcile and sign off transactions
 - Highlights reporting options
- [Accountants: Works and the Accountant](#)
 - This workshop prepares the accountants with information of a post-transaction workflow, which includes the following information:
 - Sweeping
 - Closing
 - Batching transactions
- [Administrators/Accountants: G/L End-to-End](#)
 - The General Ledger (G/L) increases transaction organization and control. This workshop provides the information needed to learn how to create and maintain segments, valid combinations, authorized profiles, and authorized rules.
- [Administrators/Accountants: Reports Reports Reports](#)
 - This workshop is intended for program administrators. It provides the following information on how to:
 - Pull Dashboard Reports
 - Pull Configurable Reports
 - Export Reports
 - Schedule Reports
- [ePayables Training](#)
 - This workshop provides the following information:
 - Ordering vendor cards
 - Maintenance of existing vendor information
 - Reconciling payments
 - Downloading paid items file
 - Troubleshooting declines
 - Recognizing the differences between various match profiles
- [Setting Up Purchase Request Functionality](#)
 - This workshop provides information on the various uses of purchase requests and how to setup applicable options.

Works™ - Live Training Workshops

Register for a Workshop

To register for a workshop within the application go to:

Tools > Training and Help > Live Training



and complete the following:

1. Click on the workshop title provided within the topics above.
For example, go to [Administrators/Accountants: Reports Reports Reports](#).

Select the desired **Date/Time** of the class you wish to attend.
2. Click **Register**.
3. Complete the requested information (i.e., Name, Email address, Company, etc.)
4. Click **Submit**.
5. Click **Done**. A confirmation email is sent to the email address you provided. The email includes detailed information about how to join the workshop.

Works™ Documentation

Additional Works Documentation is available within the application under

Tools > Training and Help > Documentation

This is where you will find the Works User's Guide as well as Quick Reference Guides.