Works

Bank of America's On-line Purchasing Card Internet-Based Solution
Access to Works

Once your application has been approved and a card has been ordered, you will receive a welcome email that includes your username and a link to the application.

**IMPORTANT** Keep this email until you receive your card. After you receive your card you may use the email instructions to log into Works.

This email will be sent from Works [mailto:WorksNoReply@works.com]. Please add it to your valid sender list to ensure the email is not sent to your Junk email.

Sample email is listed below:

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From: Works [mailto:WorksNoReply@works.com]
Sent: Thursday, February 12, 2009 3:41 PM
To: test@Virginia.EDU
Subject: UVA Card Program - - Welcome to the Works application!

Hello! This email provides details below pertaining to the University's Bank of America (VISA or MasterCard) charge card program.

Please do not reply to the sender of this email. It is a system-generated email from the Works application used by your organization.

Read the message below regarding the Works application. If the message requests that you take an action in the application, a link may be included below the message to allow you easy access to the login screen.

A Notice From The Works Application

Cardholder Name,

To set your password, begin by entering your username or email address at this URL:

https://payment2.works.com/wpm/validate?code=2148501647--
53c9c9ad9212044ccd1e6ef1836014c0

Your username: 207_test
Your email address: test@Virginia.EDU

If the above link does not work, copy and paste the link directly into your browser's location field. Before accessing the application, make sure your browser enables cookies, allows pop-up windows (for the "works.com" domain), and checks for newer versions of stored (cached) pages automatically. For more information on how to configure these settings, consult your browser's documentation.

Please also note that the link above allows you to access the application one time only. After your initial login, you must access the
application by entering the following URL in your browser’s location field: https://payment2.works.com/wpm/bookmark. We recommend that you use your browser to create a bookmark for this address to quickly access the application in the future.

If you have any further questions, please contact your Program Administrator(s) listed below. Thank you and have a great day.

For further assistance, please contact one of your program administrators:

DOLORES HILDEBRAND djh2c@virginia.edu
CARRIE MCGOWAN csd6n@virginia.edu

Log into Works at: https://payment2.works.com/wpm/bookmark

Works is a registered trademark of Works.

Please Note:
It is every Cardholder’s responsibility to create an account in BOA Works so they can review their transactions, print statements, and initiate disputes.

This special email site, and log in information on the email you receive in your Inbox will only be valid for 60 days. If you attempt to access this site using the information in the email after 60 days, it will not work. You will have to contact Bank of America at 1-888-449-2273 for instruction on how to access your account.

Creating a Password

To create a password

1. Click the first link in the email message to open your internet browser. Enter your email address or username provided in the email.

Username/email address page display
2. Click Ok

3. Enter a password in the Password field, and then enter the same in the password in the Confirm field.

4. Click the arrow in the Question field and select the desired security validation question.

5. Enter an answer to the question and repeat the same answer in the Confirm field and click Ok.

6. Bookmark the following URL: Http://payment2.works.com for future use.

The home page displays
Generating Useful Reports

Below are instructions for generating reports that most cardholders find useful. For additional information about creating and generating reports for your own use, see the Reports Quick Reference Guide.

Obtaining your Monthly Cardholder Bill from Works

The following template has been designed for you to use in lieu of the paper bill sent from Bank of America each month. The template below is available 48 hours after cycle close for you to access.

1. Click Reports > Reports in the Navigation bar and select Spend Reports.

2. From the Report Template menu, select Choose from all available templates....

3. A separate box will open. You will select the SPCC, GOLD and ATC Memo Statement by selecting the radio button to the left of the name and Hit the “Finish” button.
4. The report is already formatted for you and it is defaulted to run for the previous billing cycle and the dates of the cycle will be displayed. If you need to run for a different cycle period than what is defaulted and displayed, you can click on the Date box and select the dates you need.

![Post Date: X Date... 02/16/2008 - 03/17/2008](image)

5. Go down to the bottom of the page and Click Submit Report.

6. Within a few moments, you will be prompted to save or download the file.

**NOTE:** If a vendor passed the PCO number, it can be populated in the CRI or PID fields on the memo statement.

**Running a Report on a Recurring Basis**

You can set this template to automatically run for you after each cycle by setting up a schedule to run. You will want to set Every Billing cycle plus 2 days.

► **To run a report on a recurring basis**

1. Select a template and review its attributes as described in either of the previous two procedures.

2. Click **Show Expert View**.

3. Confirm that the date range in the **Add General and Column Filter** section reflects the appropriate time period.

4. In the **Scheduling & Expiration** section, select the button next to **Recurring** and select the appropriate timeframe.

   If you would like to run a monthly statement after each cycle closes, choose “Every billing cycle plus X days” and select 2 days to ensure transactions have time to post. Be aware that changes to allocations after the report generates will not be reflected.

5. Click Submit Report.

6. Each time the report generates, a new **Action** item will be included on your **Home** page:

   ![Action Table](image)

   7. Click the action item to view the details of the report and display or save the report to a file (such as .pdf).