University of West Georgia

Purchasing Services
Job Aid I

Requesting P-Card Pre-Approval for Planned, Routine or Non-urgent Transactions

- Go to: https://www.google.com/drive/
- Log in with your UWG username and password. This is the username and password used when logging onto your computer
- Type your name in the search bar.
- Click on the file in the menu that is your name followed by "Purchasing Card Log".
- **FIRST TIME ACCESSING THE SHEET ONLY:**
    - **Click on Tools**
    - **Select Notification Rules**
    - **Select "Any changes are made" and "Email – right away"**
- Fill out a row describing the transaction for which you are requesting approval. Make sure to fill out the following rows at a minimum:
    - Pre-Approval Request Date
    - Vendor Name
    - Description of Purchase
    - Intended Business Use
    - Chart String
    - Pre-Approval Request Amount (This can be an estimate if the actual amount of the purchase is unknown.)
- Click on File.
- Select Email Collaborators
- Type a message (Ex: Please approve) and select the box "Send a copy to myself" option if desired.
- Hit Send.
- An email will be sent to both approvers.
- You will receive an email from each approver once they have accessed the sheet and made changes to the Supervisor Approval or Budget Approval columns.
- **You must receive both approvals before proceeding with the transaction.**
- To review approval history, click on File – See Revision History. The cells will be highlighted different colors for each individual approver.

Please contact the P-Card Administrator if any of the information or approvers listed on the Purchasing Card Log need to be changed or updated.