

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.



Purchasing Card Log ☆ 📁

File Edit View Insert Format Data

Share...

New ▶

Open... Ctrl+O

Rename...

Make a copy...

📁 Move to...

🗑 Move to trash

Import...

See revision history Ctrl+Alt+Shift+H

Spreadsheet settings...

Download as ▶

Publish to the web...

Email collaborators...

Email as attachment...

Document details...

🖨 Print Ctrl+P



Send message

Subject

Purchasing Card Log

Message

Send a copy to myself

Send

Cancel

Recipients

Select all - none

	Lisa Elliot	<input checked="" type="checkbox"/>
	Shelly Parker	<input checked="" type="checkbox"/>
	Connie Smith	<input checked="" type="checkbox"/>

- Select File > Email Collaborators after you've filled in a row for each p-card transaction that needs pre-approval.
- The Send message box will pop up. Type a message such as "Please approve" if desired. Then click Send.



Both of the approvers checked in the Send message pop up will receive an email at the same time:

Connie Smith Purchasing Card Log

Inbox x



Connie Smith (via Google Sheets) <drive-shares-noreply@google.com>

May 15



Reply

to me

Connie Smith has sent a message regarding the following spreadsheet:

 [Connie Smith Purchasing Card Log](#)



Please Approve.

Google Sheets: Create and edit spreadsheets online.

Google Inc. 1600 Amphitheatre Parkway, Mountain View, CA 94043, USA

You have received this email because someone shared a spreadsheet with you from Google Sheets.

Google™

Each approver will need to click the link in the email which will take them to the Purchasing Card Log.



- The cardholder will receive an email notifying them that changes have been made once the approver has added their initials to the spreadsheet.

"Connie Smith Purchasing Card Log" was edited recently Inbox x



Google Docs <notify@google.com>

to me ▾

See the changes in the Google Document "Connie Smith Purchasing Card Log": [Click here](#)

- lelliott made changes from 3/28/17 11:25 AM to 11:26 AM (Pacific Daylight Time)

Open the current version of the Google Document "Connie Smith Purchasing Card Log": [Click here](#)

Powered by Google Sheets

Want to stop receiving this email? [Click here](#)

- Once both approvers have initialed the spreadsheet the purchase can be made.

