Works Overview Video Script

Introductory Slide

No audio

Slide 2

If you have ever used FLAIR to process or approve PCard transactions, you may have wondered if there was an easier way to get it done. Well, there is an easier way!

We are excited to share with you a project that we have been working on to help streamline the process for our PCard users. Over the past year the Florida Department of Financial Services has been working closely with Bank of America to integrate Florida's policies and procedures into Bank of America's Works system to meet Florida's need for growing PCard processing. Works uses technology that will improve our processes for handling PCard transactions. Over the next several months we will be introducing agencies to the new system, as well as offering many training tools to help users transition into Works.

Slide 3

Currently all agencies who use PCards are familiar with this FLAIR screen; the limited, available color schemes and navigating with function keys, rather than a mouse, can make FLAIR somewhat difficult.

Slide 4

This is Works! Works is a modern web-based application. While some processes will remain the same, such as the approval workflow, having new technology at our fingertips, allows you to perform your work more quickly.

The new technology will improve efficiency. Each user will play a role in the new application. An account holder, the individual creating the transaction, previously referred to as a card holder, will be part of the work flow, improving our current processes.

Over the next few minutes, you will see some of the exciting new features that Works has to offer

Slide 5

While FLAIR screens can be difficult to navigate, the Works website allows for easy navigation, making function keys obsolete for processing PCard transactions.

Slide 6

Instead, the Works website is designed for efficiency and can be used by anyone who has experience navigating with a mouse.

Users within the approval workflow will appreciate the layout as it allows you to customize, sort and view information so that you can analyze the information more timely and accurately. Additionally, some fields and accounting codes may auto-populate for efficient processing, depending on your settings.

Slide 7

All users, regardless of their roles will be able to access Works from any computer or electronic device, at any time as long as internet access is available. So network access, as needed with the current FLAIR system, will no longer be necessary.

With Works' web based and mobile, easy access, you will be able to perform tasks at any time, potentially expediting the work flow from the individual transaction through the approval process. This will help increase accessibility for those of you who are current cardholders so documentation can be more accessible throughout the process.

Slide 8

Since Works is a web based program, Administrators will be able to take advantage of real time updates for account holder maintenance, such as changes to credit limits or user profiles, verse the current overnight process to update user accounts in FLAIR. You will also have the ability to update your own passwords when necessary. With a few clicks, your password will be reset, and within a few minutes, you will be ready to go.

Slide 9

Account holders will be able to upload any type of documentation, such as an emailed receipt or a scanned document, that is necessary for processing a transaction into Works at any time, even if the transaction is not displaying in Works yet. To make managing receipts easier, Works allows you to attach a receipt to more than one transaction at one time; and stores all receipts in one location.

Slide 10

If you're an account holder, once a transaction appears on your dashboard, a receipt can be added in just a few clicks. You will be able to attach a previously stored receipt or add a new receipt directly to the transaction. If you are adding a receipt for the first time, the receipt will be attached to the individual transaction, as well as stored in your receipts to be accessible for future reference.

Department of Financial Services, Division of Accounting and Auditing

These features will allow you, the account holder, to easily manage and provide necessary documentation for the approvers to review prior to approving the charges.

Slide 11

Accessing information is easy in Works. Works contains existing templates for processing reports, as well as the ability to create and maintain templates for job specific reports. The reports can be generated in Excel for additional formatting or as a PDF, and reports can be scheduled to automatically run at desired times of the day, week or month.

Slide 12

The Office of Florida Financial Education will be offering training that is specific to how the State of Florida will be using Works to help you become more familiar with the navigation and functionality of Works, especially for the features indicated today. Lastly, an Agency Enrollment Guide will be provided before implementation to help guide the agencies through the set up process for integration into Works.

Slide 13

With all the new technology and training resources available, we hope to make the transition from FLAIR into Works a quick and easy process for you. Once enrolled, you will have many tools to expedite your processes, improve your analysis and remove the tediousness of your simple, daily tasks. The role you play is a crucial part for the State of Florida's transition into Works. The benefits will be worth your effort. You can find updates on our transition process on the PCard Works project site https://myfloridacfo.com/division/AA/PCardWorks.htm.