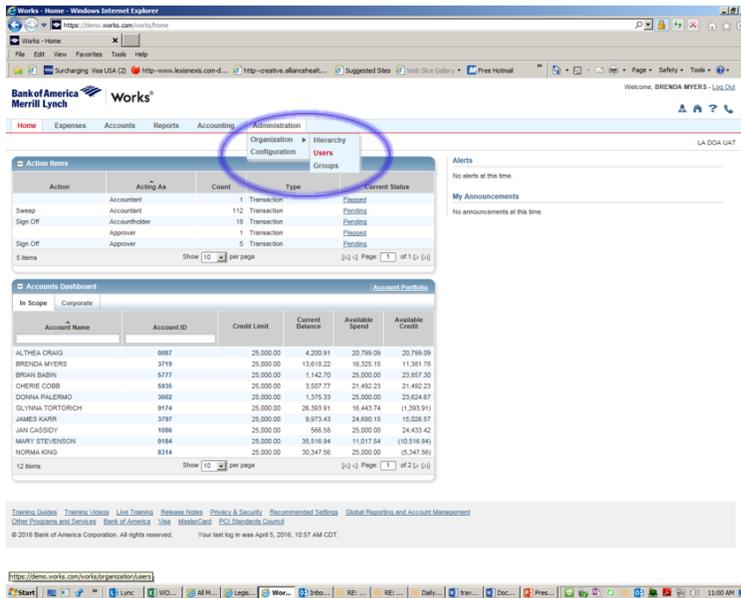
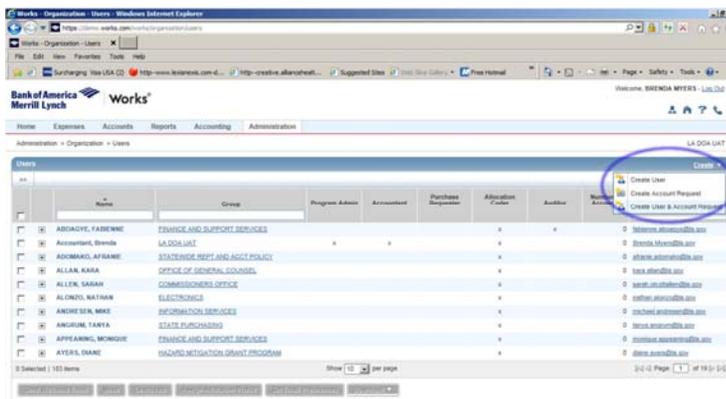


Works – Creating User and Account Request (Ordering a Card)

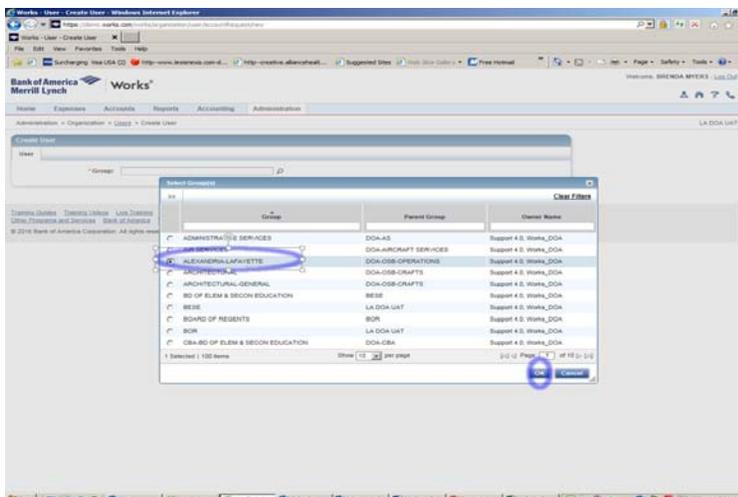
1. Go to Administration>Organization>User



2. Click Create>Create Use & Account Request



3. Select the radio button next to the group in which the cardholder is assigned, click OK



4. Complete the following fields

Note: Steps B-D are to be completed by agencies which utilize the accounting function of Works Workflow

- A. First Name
Last Name
Email Address (must be business address)
Login Name

- B. If agency is utilizing the accounting function for allocating transactions, check Allocation Coder, otherwise do not check a role

- C.

The screenshot shows the 'Create User' form with several sections and fields. Annotations A through E are placed over specific parts of the form:

- A:** A large blue circle encompasses the 'User Info' section, including fields for First Name, Middle Name, Last Name, Email Address, Login Name, A/P Payee ID, Verification ID, and Signature Limit.
- B:** A blue oval highlights the 'Allocation Coder' checkbox and the 'Restrict Allocation Assistant to valid and authorized codes' checkbox.
- C:** A blue oval highlights the 'Allocation Profile' dropdown menu in the 'Allocation Settings' section.
- D:** A blue oval highlights the 'Default Allocation Codes' table, which has columns for GL01: FUND/AGENCY/ORGANIZATION, GL03: OBJECT, GL04: SUB-OBJECT, and GL05: AGENCY/REPORTING CATEGORY.
- E:** A blue oval highlights the 'Email Notifications' section, including dropdown menus for 'Reports ready for download', 'Pending tasks', and 'Configuration changes'.

If using the accounting function select