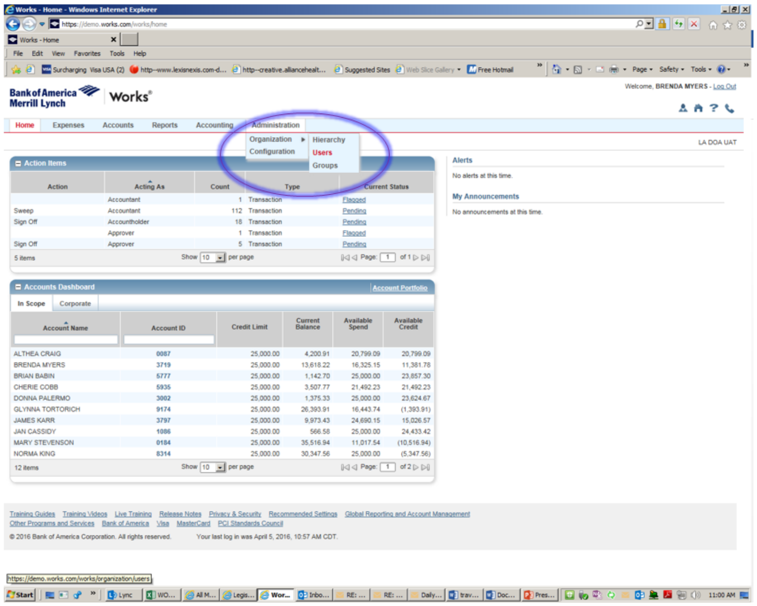
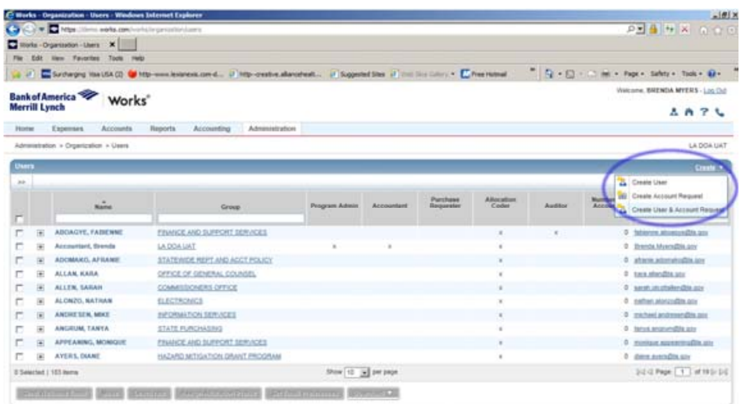
Works – Creating User and Account Request (Ordering a Card)

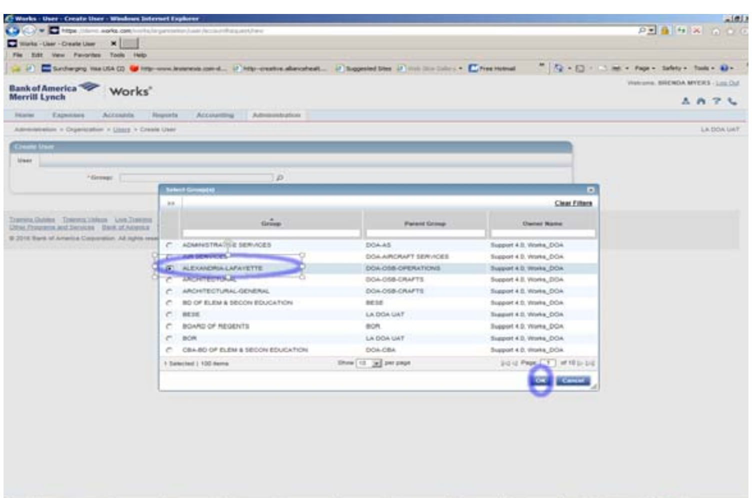
1. Go to Administration>Organization>User



2. Click Create>Create Use & Account Request



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



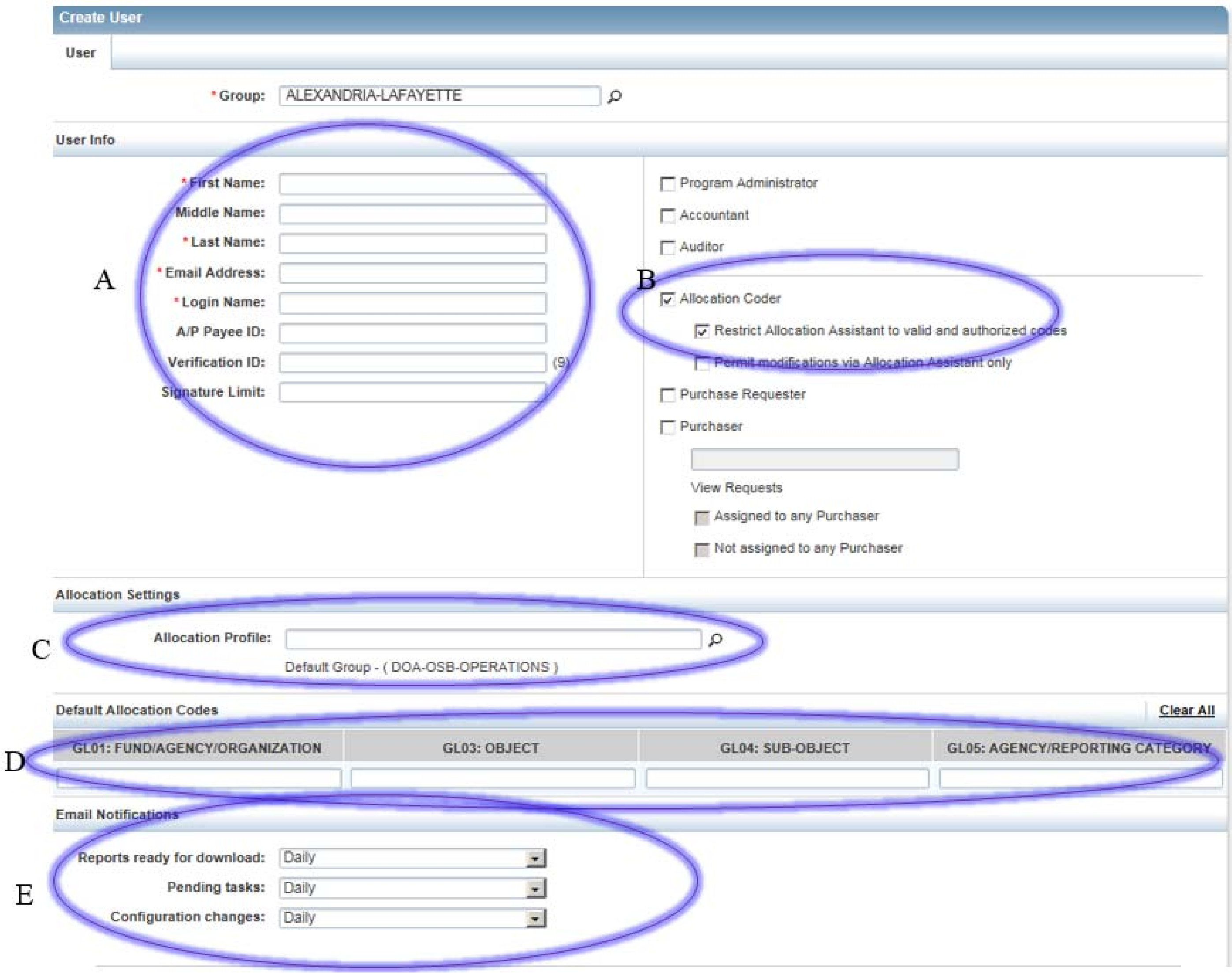
4. Complete the following fields

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.



If using the accounting function select