

# User Guide

Users guide for workauth.cores.utah.edu

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# Using the Work Authorization System

## Work Auth System Overview

Prerequisite to gaining access to the cores resource system or being able to request services from any cores managed facility you will be required to fill out a "Work Authorization" form. This form is a digital authorization and data collection system that collects the necessary information for the Cores to create charges against the account information provided in the form.

Work Authorization forms come in 2 types:

1. **On Campus Forms** - Used to add University of Utah internal accounts to our charge system. Submitters will be required to provide contact information for various individuals in addition to a valid internal University of Utah PeopleSoft chartfield.
2. **Off Campus / Commercial Forms** - Used to create charge account records for all other users. Users will be required to provide contact information for the accounts in questions. No other information is collected.

In both cases users are required to provide the following information:

- **Submitter Information** - The name and contact email of the person submitting the form
- **PI/Approving Contact** - The name and contact information for the person who is responsible for reviewing and approving this work authorization request inside the submitters organization. This may be the same person as the submitter.
- **Accounting Contact** - The name, contact information, and mailing address of the accounting group/individual inside the submitters organization to which statements and/or invoices should be directed. This is also the individual who will be contacted regarding late payment, insufficient funds, or other issues related to billing.
- **(On Campus/Internal Accounts Only) Account Information** - This section will appear only on the "On Campus" for and will collect the Peoplesoft Chartfield, Account Title, and other funding related information for internal university accounts.
- **Comments** - This free text box is present to allow the user to request or provide other special information as needed.
- **Authorized Individuals** - This section collects a list of authorized individuals who may create charges on the account. All fields are required. The PI/Approving contact may be copied to this section using the "Copy Approver/PI" button. Users listed here will have an account created in our systems so they may create charges and login to our systems. For already existing accounts users may also be marked for removal instead of addition using the provided dropdown.

## Submission Process

1. Users fill out the appropriate work authorization form
2. Cores administration office will receive a notification email that a new work authorization has been submitted and is pending processing.
3. The cores admin office reviews the submission and:
  - Creates / Updates the listed account
  - Adds/Removes user permissions on the selected account
  - Marks the work authorization as completed.
4. On completion the Work Auth System emails the submitting user and any listed authorized users that the Work Authorization has been completed and their account access updated.