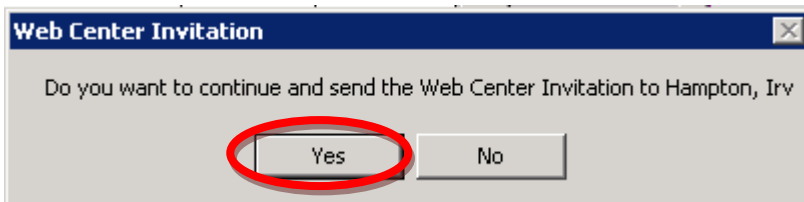


## WebCenter v. 5 Quick Start Guide – Customer Portal

### 1) How to add a new user to the WebCenter Customer Portal

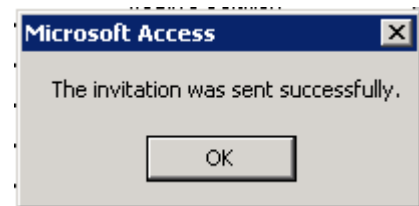
- a) If you're using TempWorks mdb (Access version) - Open the record to the **Contact's Visifile**. Verify that they have a *Contact Method* type of "Email" and that the *Email* Address is formatted correctly. Then click on the *Invite to WebCenter* button.

Msg Date	Action	Message	Rep	DateDue	Completed?
5/30/2008	Message	Personal call summary: Signed new Contract - added business	alisha		<input type="checkbox"/>
1/28/2008	Interview	Sent Marketing information to Irv about our new healthcare divis	alisha		<input type="checkbox"/>
1/9/2008	Message	Showed up on time for first day of assignment.	alisha		<input type="checkbox"/>
12/21/2007	Message	Reactivate	alisha		<input type="checkbox"/>
12/21/2007	Deact (Othe	Met him at a networking function. Will follow up to discuss bene	alisha		<input type="checkbox"/>
12/21/2007	Message	Spoke with him about his personnel needs. Possible fit for cleri	alisha		<input type="checkbox"/>

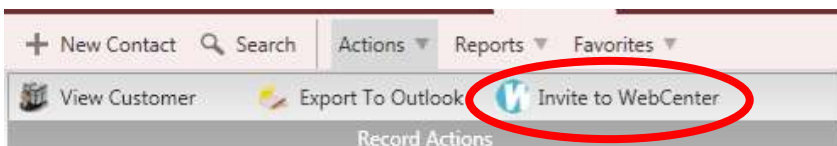


This will bring up the prompt to the left. Click *Yes* to send the WebCenter *Email* invitation. Select *No* to cancel this action.

Once the WebCenter *Email* invitation has been sent the prompt to the right will be displayed. Click *OK* to clear this prompt. The **Contact** will now receive an *Email* with a link to the WebCenter Customer Portal log in screen where they can choose a *User Name* and *Password*.



- b) If you're using TempWorks Enterprise (version 12R7) – Open the **Contact's** record. Verify that they have a *Contact Method* type of "Email" and that the *Email* Address is formatted correctly. Select *Invite to WebCenter* from the **Contact** *Actions* drop down menu.



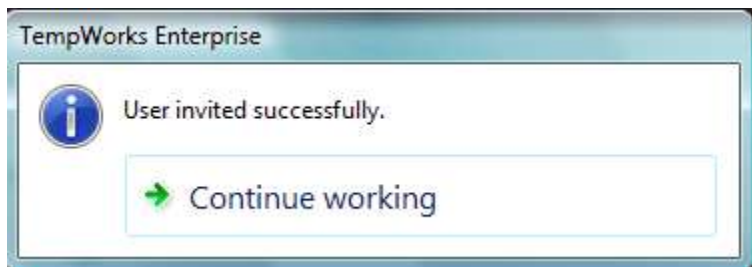
If the **Contact** has already been set up with a WebCenter account, it will be displayed as *Manage WebCenter Account*.

After *Invite to WebCenter* has been selected the prompt to the right will be displayed.

Step 1) Choose the **Contact's** *Role* from the *Assign Role* drop down menu.

Step 2)

- a) If choosing the *Invite User to WebCenter* radio button just click *Invite*.



Once the WebCenter *Email* invitation has been sent the prompt to the right will be displayed. Click *Continue working* to clear this prompt. The **Contact** will now receive an *Email* with a link to the WebCenter Customer Portal log in screen where they can choose a *User Name* and *Password*.

- b) If choosing the *Manually Create User Account* radio button, enter the *User Name* and *Password* for the **Contact** and click *Create*. This information will now have to be communicated to them separately.

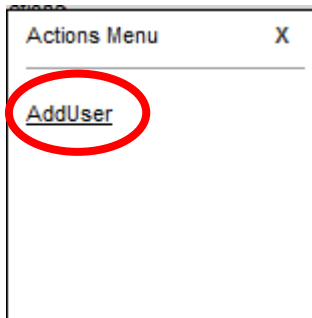
With the first two types of WebCenter Customer Portal user set up the **Contact** is sent an *Email* with a link to a webpage like the one pictured to the left.

Their *Actual Name* will already be populated from the **Contact** record in TempWorks.

They will add their *User Name*, and then enter their *Password* twice, once in the *Password* field and then again in the *Verify Password* field. Then they will click *Register* and they will be added as a WebCenter Customer Portal user.

They can now access the WebCenter by clicking the *Continue* button or go to the log in page and enter the *User Name* and *Password* they selected to view WebCenter Customer Portal functionality.

- c) If you're accessing the WebCenter Administrator Portal click on [User Search](#) from the menu on the left of the **Control Panel** page. Select "Customer Contact" from the *Select User Type* drop down menu and select "WC NonUser" from the *Select User Level* drop down menu. Then click on one of the [Alphabet links](#), enter the **Contact's ID** (Unique Contact ID) in the *ID* field or *Name* and click *Search*.



Once the correct **Contact** has been located, click on the [Actions](#) link for their entry line to display the *Actions Menu* to the left. From this menu select [AddUser](#) (this will be the only option).

Create User Account For: Anderson, James

Name:  OriginID:  OriginTypeID:

UserName:  Password:

Add User

The *Create User Account* form will be displayed with the **Contact's Name**, *OriginID*, and *OriginTypeID*. Enter the *UserName* and *Password* for them and then click on [Add User](#).



Once [Add User](#) has been selected the page will update to display that the **Contact** has been added to WebCenter and will display their *User Name*, *Full Name*, *Default Role* and that their *Default Notification Subscription* has been set up.

\*Note – If the user does not have a *Contact Method* with type of "Email" on their **Contact** record the default notification subscriptions will not be set up, as shown in the picture above.

## 2) The Customer Contact is set up as a WebCenter user, now how do they log in?

- a) The user will access your website and click on your link for **Customers** (and possibly **Employees**) as shown from our demo website [www.jobsonastick.com](http://www.jobsonastick.com):



- b) This will then take the **Contact** to the WebCenter log in screen where they enter their *User Name* and *Password*. Then they should click *Sign in*.



- c) If the **Contact** has forgotten their *User Name* they should click on the [Username](#) link at the bottom:



They will need to enter their *First Name*, *Last Name*, and *E-Mail Address* and then click the [Retrieve User Name](#) link. This will automatically send them an *Email* with their *User Name* listed.

- d) If the **Contact** has forgotten their *Password* they should click on the [Password](#) link at the bottom:

They will need to enter their *User Name* and click on the link for [Generate New Password](#). This will create a new system-generated *Password* that will automatically be *Emailed* to their *Email Address* as listed in the TempWorks database.



### 3) What information can the Customer Contact select or change from their My Settings form?

a) In the lower right corner of the screen the **Contact** will click the My Settings link to open the following form:

Personal Settings Notification Settings

#### Personal Settings

##### Change Password

To change your password, please type your old password and then enter your new password in the boxes below.

Old Password:

New Password:

New Password Retype:

##### Change Email

Current Email Address: test@test.com  
To change your email, please type in your new email address below

Email Address:

athew : 12320 [ Stop Impersonation ] [My Settings](#)

b) Under the *Personal Settings* tab the user can change their *Password* by entering their current *Password* into the *Old Password* field.

##### Change Password

To change your password, please type your old password and then enter your new password in the boxes below.

Old Password:

New Password:

New Password Retype:

They should then enter their new *Password* in twice, once in the *New Password* field and again in the *New Password Retype* to confirm it was entered correctly. Then click on *Change Password* to update.

c) Also under the *Personal Settings* tab the user can change the *Email Address* attached to their **Contact** record in the TempWorks database (*Contact Method* type of "Email").

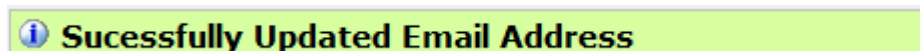
Enter the new *Email* information into the *Email Address* field. Then click on the *Change Email* button.

##### Change Email

Current Email Address: test@test.com  
To change your email, please type in your new email address below

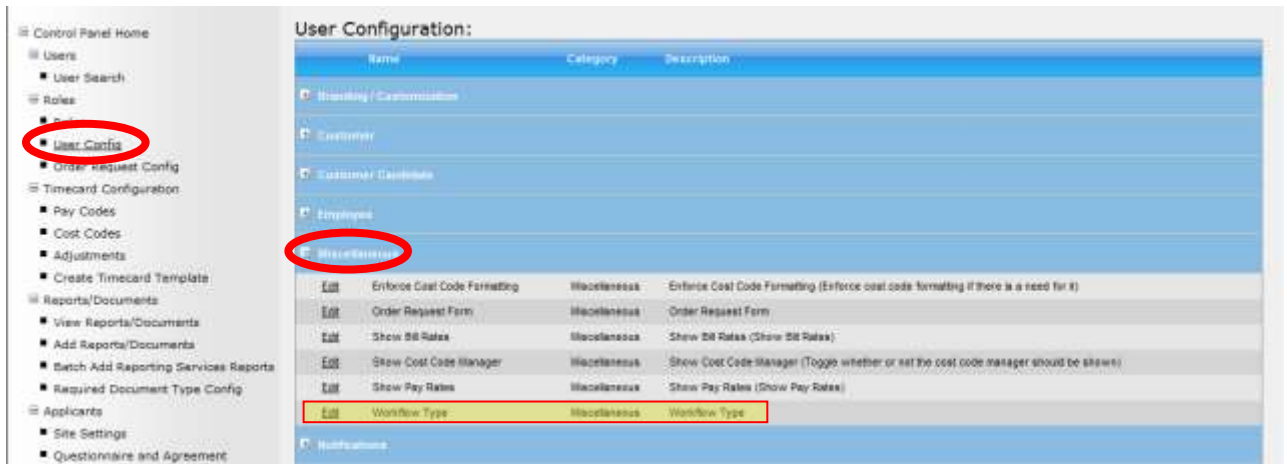
Email Address:


\*Note – when the *Password* or *Email* is updated there will be a green confirmation bar displayed at the top of the screen, similar to the one below:

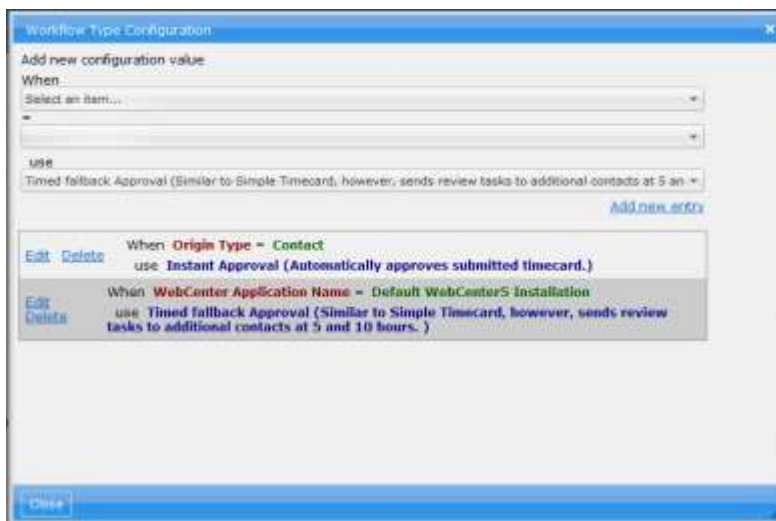


#### 4) Where do I designate that the Customer Contact will be approving WebCenter timecards?

a) First verify that the User Config is set up in the WebCenter Administrator Portal.



From the **Control Panel** page click on the User Config under the **Roles** category. Then click on the  button for the **Miscellaneous** option. The list will expand as shown above. Select the Edit link on the **Workflow Type** line to bring up the following form:



What is selected from the **When** drop down menu will determine what information is populated in the = (**Equals**) drop down menu. If timecard approval workflow is the same for all **Departments** select **Customer** from the **When** drop down menu and then select the **Customer** from the **Equals** drop down menu.

If it varies within the **Customer** (at any level in the hierarchy) select **Department** from the **When** and the **Customer/Department** from the **Equals**.

The **Use** drop down menu will display the different workflow options that can be applied to that **Customer** and or **Department**. In the top example, the User Config is set up so that if the **Customer Contact** enters the timecard it is automatically approved and submitted to TempWorks. In the second example the default for all **Customers** is "Timed Fallback Approval".

**\*Note – If the User Config is applied to the **Primary Customer** record, all **Departments** under the **Primary** will have the same set up. If it's applied to a **Department other than the Primary**, it will only be applied to the **Department** selected, not any Sub-Departments that are related to it.**

The **Workflow Type Configurations** available are explained here:

- **Simple Timecard** – This is a basic workflow for timecards with one approval. The timecard approver's **Contact Role** on the **Order** must be set to "Supervisor" (Standard).
- **WC4 Style Approval** – All **Order Contacts** have the ability to approve the timecard. The **Contact's Role Type** on the **Order** doesn't matter as long as they're listed.

- **Timed Fallback Approval** – The **Contact** listed as the “Supervisor” is the main approver and receives notification first. If no approval is made by the “Supervisor” within five hours, the “Timecard Alt 1” **Contact** can approve in addition to the “Supervisor”. If approval is not made by the “Supervisor” or “Timecard Alt 1” within ten hours, then the “Timecard Alt 2” **Contact** can approve.
- **Timed Fallback by Report To** – The **Contact** listed as the “Report to” is the main approver. Works like the Timed Fallback Approval, except that “Timecard Alt 1” can approve after one hour and “Timecard Alt 2” can approve after three hours.
- **Instant Approval** – The timecard is automatically approved when submitted. This is usually selected when the “Supervisor” enters the time for the **Employee** from the WebCenter Customer Portal.
- **Two Tier Timecard** – The timecard is first submitted and approved by the **Order** “Supervisor” and is then submitted to the “Hiring Manager” for their approval before updating to “approved” *Status* in TempWorks.
- **Simple Timecard by Report To** - This is a basic workflow for timecards with one approval. The timecard approver’s **Contact Role** on the **Order** must be set to “Report To”.

**\*Note – If the main approver Contact Role is not listed on the Order, then any timecards for the Order will automatically be approved.**


b) Once the User Config is set up, attach them to the **Order** as a **Contact** by assigning them a *Role*.

1) If you’re using the TempWorks mdb (Access version) – Open the **Order** record to the **Order Details** tab. Select the **Contacts** by clicking on the *Modify Contacts* button on the right side of the screen.

When *Modify Contacts* is clicked the form to the right will be displayed.

From the Roles box on the left select the *Role* (reference *Workflow Type Configurations* above to determine appropriate *Role*) then select the **Contact** from the People box on the right. Once both records are selected, click on the *Assign Role* button in the middle.


They will now be listed with that *Role Type* at the bottom of the form.

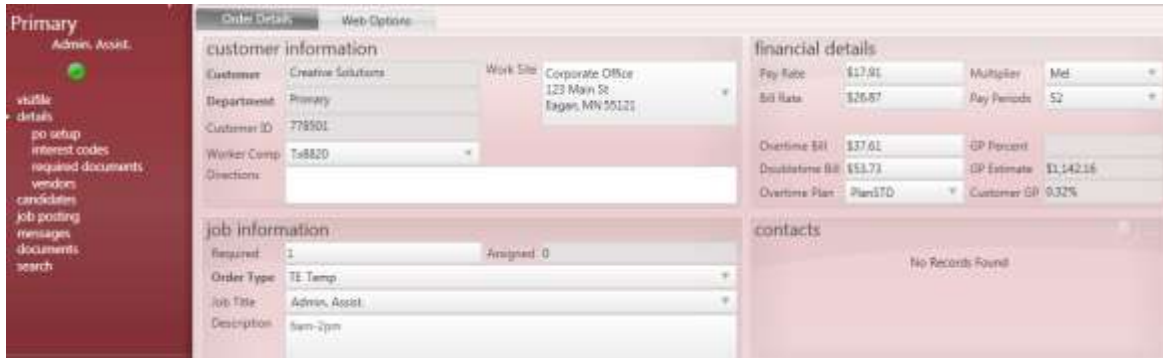
Click on the  button (*Close Door*) in the upper left to close this form.

Contacts	
Supervisor	Sanders, John (651) 555-1212x123
Timecard Alt 1	Stewart, Kevin (651) 555-1212x123
Timecard Alt 2	Thomson, John (651) 555-1212x123

Modify contacts

The **Order Details** form will now list all of the **Contacts** associated with this **Order** record as shown to the left.

- 2) If you're using TempWorks Enterprise – Open the **Order** record to the **Details** form. Select the **Contacts** by clicking on the  button (*Manage Contacts*) on the right side of the screen.



When *Manage Contacts* is clicked the form to the right will be displayed.

From the *Contact* drop down menu select the name of the **Contact**. Then select the *Role* (reference *Workflow Type Configurations* above to determine appropriate *Role*) from the Available Roles area. Next, click on the arrow button in the middle.

Their *Name* will now be listed with the *Role* that was selected. To update the **Order** with the *Role* information, click *Save*.



Name	Role
Hampton, Irv	Supervisor
Powers, Danger	Timecard Alt 1

Name	Description	Office Phone
Hampton, Irv	Supervisor	(651) 555-1212x123
Powers, Danger	Timecard Alt 1	651-452-0366
Justin, Hamilton	Timecard Alt 2	

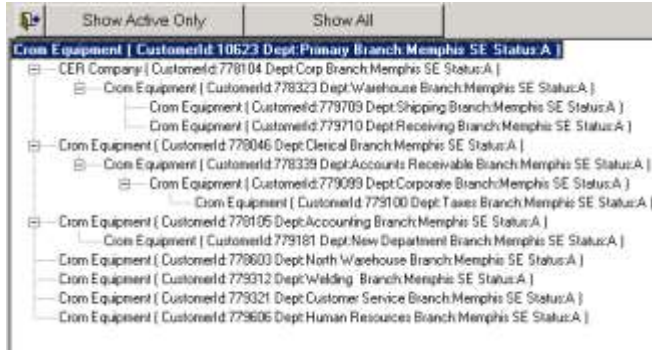
The **Order Details** form will now list all of the **Contacts** associated with this **Order** record as shown to the left.


*\*Note – The Roles selected in the two examples above would correspond with the "Timed Fallback Approval" Workflow Type Configuration.*

**5) Why is the Contact not able to view the correct Orders and/or Invoices in WebCenter?**

- a) The **Contact** must be associated with the correct **Customer Department** record for the appropriate **Order** and/or **Invoice** records to be visible to them.

\*Note – The general rule is that a **Contact** will be able to see only those records for their **Department** level and below. Nothing above their level in the **Customer** hierarchy will be visible, and neither will any other **Department** information at their same level.

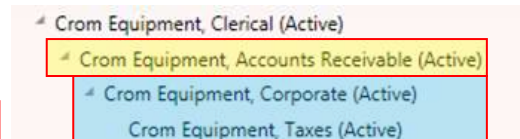
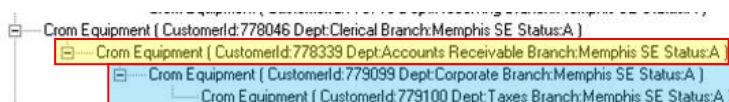


To the left is an example of a detailed **Customer** hierarchy. This form is opened in the TempWorks mdb (Access version) from the **Customer Visifile**. Click on the  button in the lower left of the screen to display the hierarchy tree.

To the right is an example of a detailed **Customer** hierarchy. This form is found in TempWorks Enterprise. Once the **Customer** record is open select **Details** from the menu on the left. Once the **Details** menu expands, select **Departments** to display this form.



In both of the examples above the **Primary** (or **Parent** Account) is highlighted. A **Contact** that has been set up at this level will be able to view **ALL Orders** and **Invoices** associated with the **Customer**.



In both of the examples above the "Accounts Receivable" **Sub-Department** (or **Grandchild**) is highlighted in yellow. A **Contact** that has been set up at this level will only be able to view **Orders** and **Invoices** for the "Accounts Receivable" **Sub-Department** and any **Departments** that fall under it. In this example the **Orders** and **Invoices** for both the "Corporate" **Tertiary Department** (or **Great-Grandchild**) and "Taxes" **4<sup>th</sup> Level Department** (both are highlighted in blue) would be viewable to a **Contact** set up at the "Accounts Receivable" level.

\*Note – In the example above the **Contact** set up at the "Accounts Receivable" level would not be able to see **Orders** and/or **Invoices** for the "Clerical" **Department** or of any other **Department** outside its "branch" of the hierarchy tree.


If a **Contact** needs to be able to view information from two **Departments** at the same hierarchy level then an additional **Department** will need to be created (the **Contact** will be attached to the new **Department**) and the two current **Departments** will need to be set up as **Sub-Department** records under the new **Department**.

\*Note – This may require extensive changes to current **Order** and **Invoice** records. Please feel free to contact TempWorks' customer support for more information on reorganizing the **Customer** hierarchy.

- b) If the **Contact** is not associated with the correct **Department** record, then it will need to be changed.
- 1) If you're using TempWorks mdb (Access version) - Open the record to the **Contact's Address** tab. In the Contact's Company section enter the first few letters of the **Customer's** name to the left side of the dividing line in the *Cust Lookup* field, hit *Enter*, and then select the correct **Customer** and **Department** record from the drop down menu displayed.

In the example above, Stephanie is associated with the Crom Equipment *Primary Department* and selecting the "Human Resources" *Department* from the drop down menu will update her record.

*\*Note – Make sure that the Customer Department record that's selected is in "Active" status as multiple Departments with the same name may have been "Inactivated".*

- 2) If you're using TempWorks Enterprise – Open the **Contact** record to the **Details** form. In the Company Information section use the *Company* drop down menu to select the correct **Customer** and **Department** record. Click on the  button at the top of the screen to *Save* and update the **Contact's** information.

*\*Note – In the TempWorks mdb (Access) version, when creating a new Contact from the Customer record, the Contact will be associated with whatever Department record is open at the time that the new record is added. In Enterprise the current Customer and Department record will default, but can then be manually selected before clicking Save. In both versions the Customer and Department must be manually selected when creating a new Contact from the Contact record area.*