

WebCenter v. 5 Quick Start Guide – Employee Portal

1) How to add a new user to the WebCenter Employee Portal

- a) If you're using TempWorks mdb (Access version) - Open the record to the **Employee'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.

Employee Lookup: Devereaux, Tammy L 6515551212x SSN:369-99-9999 Id:12467

Visifile | Address | Pay | Asg | Msg | Interview | Report | Search | Switch

Name: Devereaux, Tammy L
Home Area: Eagan MN 55121
Order Type: DirectHire
LocPref: Eagan, Apple Valley, Burnsville
Last Claim: 2/24/2009
Hire Status: Placed Full Time

Rate Desired: \$15.00
I9 on File:
Active:
Assigned:
Resume:

Contact Methods

Cell Phone	(651) 555-1212x123
Phone	6515551212x
Email	alisha@tempworks.com
Emergency	224-234-3234
Home Ph	483-345-3445

Actions

- Invite to WebCenter
- Job History
- Order Match
- Paycheck History

Date	Action	Message	Rep	Contact	Customer	Due	Done?
4/27/2009	Order Candidate	Candidate -- Devereaux, Tammy OrderID: 3724 - Creative Soluti	alisha		reative Solutior		<input type="checkbox"/>
4/20/2009	Order Candidate	Candidate -- Devereaux, Tammy OrderID: 4365 - Crom Equipme	erica		Crom Equipmen		<input type="checkbox"/>
2/24/2009	Available	Ready to work.	alisha				<input type="checkbox"/>
1/14/2009	Message	[Candidate]/[Devereaux, Tammy]/[Creative Intentions Inc]	alisha		ative Intentions		<input type="checkbox"/>
1/14/2009	Message	Did an excellent would love to have them back.	alisha		ative Intentions		<input type="checkbox"/>
12/16/2008	Message	Filing report	alisha				<input type="checkbox"/>

Web Center Invitation

Do you want to continue and send the Web Center Invitation to Devereaux, Tammy L

Yes No

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 **Employee** will now receive an *Email* with a link to the WebCenter Employee Portal log in screen where they can choose a *User Name* and *Password*.

Microsoft Access

The invitation was sent successfully.

OK

- b) If you're using TempWorks Enterprise (version 12R7) – Open the **Employee'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 **Employee** *Actions* drop down menu.

New Employee Search Actions Reports Favorites

- Create assignment for Crom Equipment, Primary
- Set as candidate for Crom Equipment, Primary
- Create and Export a resume
- Transfer to another branch
- Track-1 Background Report
- Invite to WebCenter

Record Actions

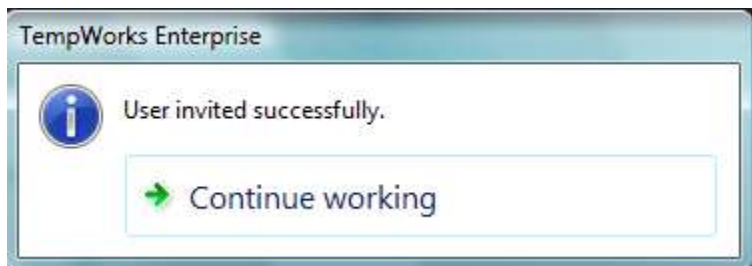
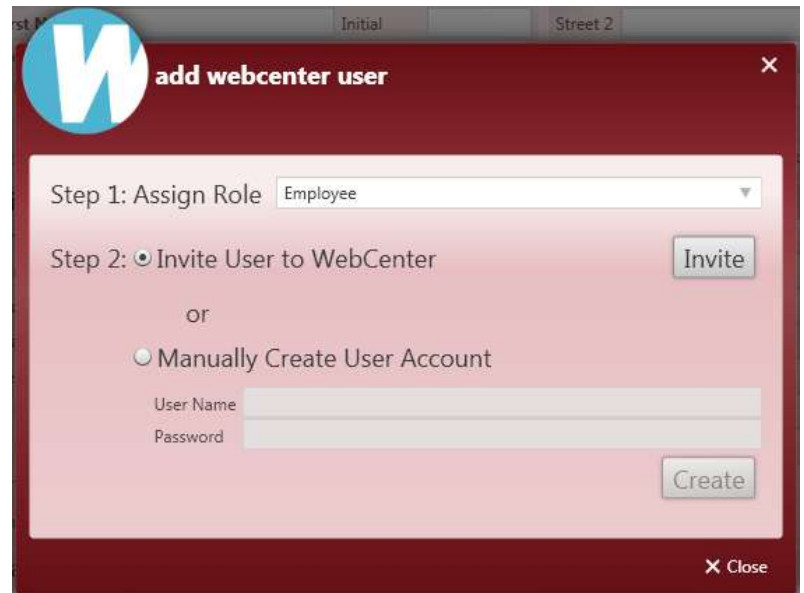
If the **Employee** has already been set up with a WebCenter account, it will be displayed as *Manage WebCenter Account*.

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

Step 1) Choose the **Employee'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 **Employee** will now receive an *Email* with a link to the WebCenter Employee 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 **Employee** and click *Create*. This information will now have to be communicated to them separately.



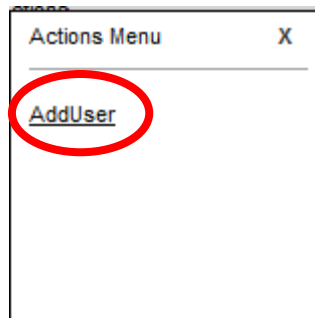
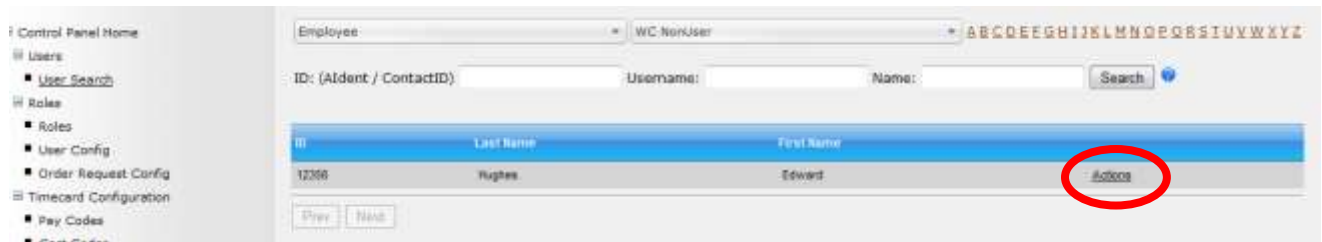
With the first two types of WebCenter Employee Portal user setups, the **Employee** is sent an *Email* with a link to a webpage like the one pictured to the left.

Their *Actual Name* will already be populated from the **Employee** 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 Employee 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 Employee 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 "Employee" 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 **Employee's Aident** (Unique Employee ID) in the *ID* field or *Name* and click *Search*.



Once the correct **Employee** 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).

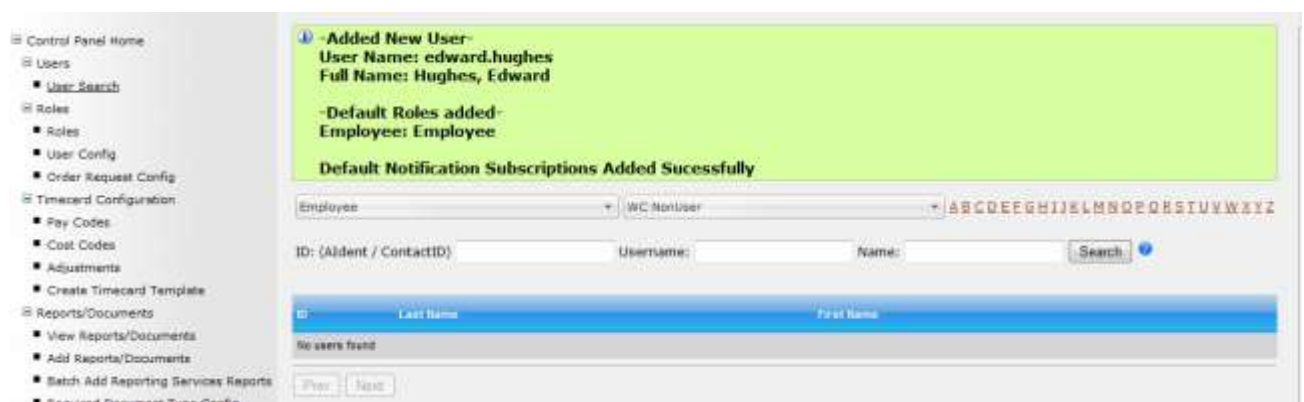
Create User Account For: Hughes, Edward

Name: OriginID: OriginTypeID:

UserName: Password:

[Add User](#)

The *Create User Account* form will be displayed with the **Employee'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 **Employee** 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.

2) The Employee 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 **Employees** (and possibly **Customers**) as shown from our demo website www.jobsonastick.com:



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



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

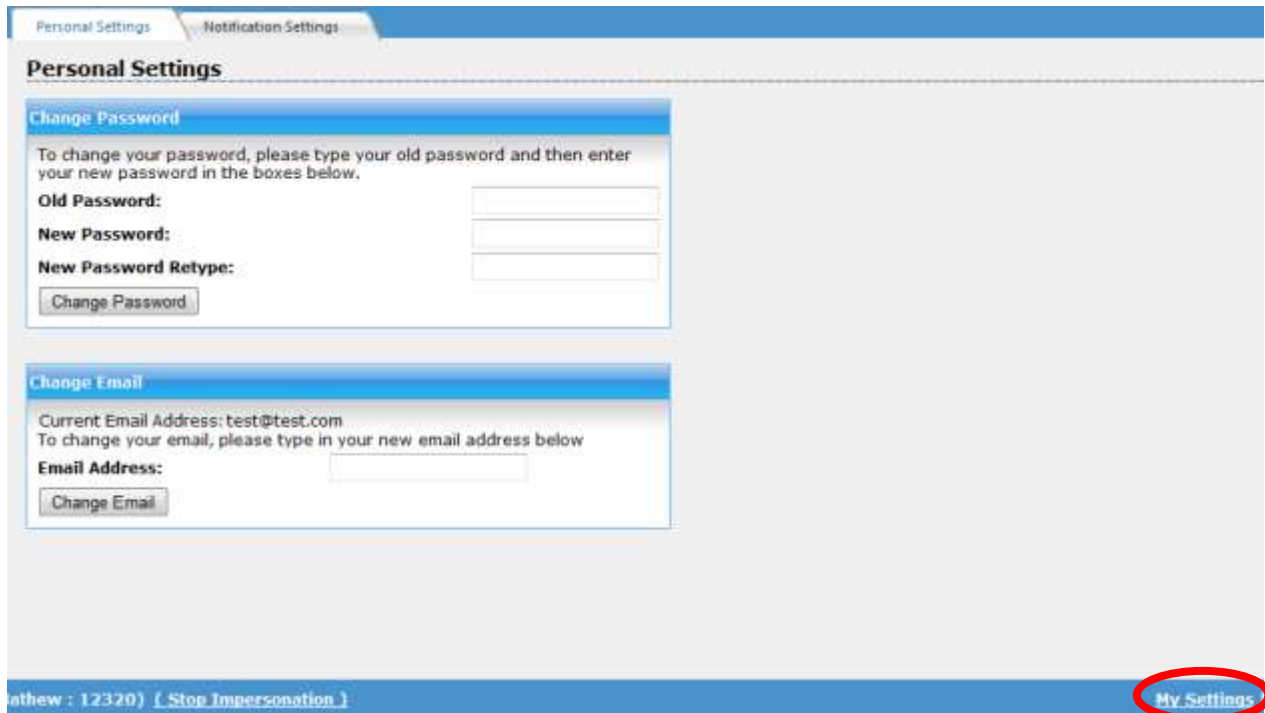
They will need to enter their *First Name*, *Last Name*, and *E-Mail Address* and then click the [Retrieve User Name](#) link. This will automatically send them an *Email* with their *User Name* listed.

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

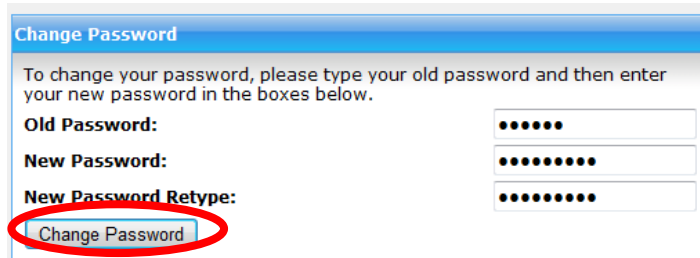
They will need to enter their *User Name* and click on the link for [Generate New Password](#). This will create a new system-generated *Password* that will automatically be *Emailed* to their *Email Address* as listed in the TempWorks database.

3) What information can the Employee select or change from their My Settings form?

- a) In the lower right corner of the screen the **Employee** will click the [My Settings](#) link to open the following form:



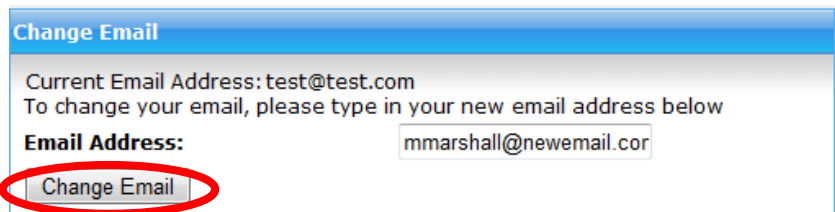
- b) Under the *Personal Settings* tab the user can change their *Password* by entering their current *Password* into the *Old Password* field.



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 **Employee** 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.



*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:

