

WebCenter Admin - Web Evaluation Setup

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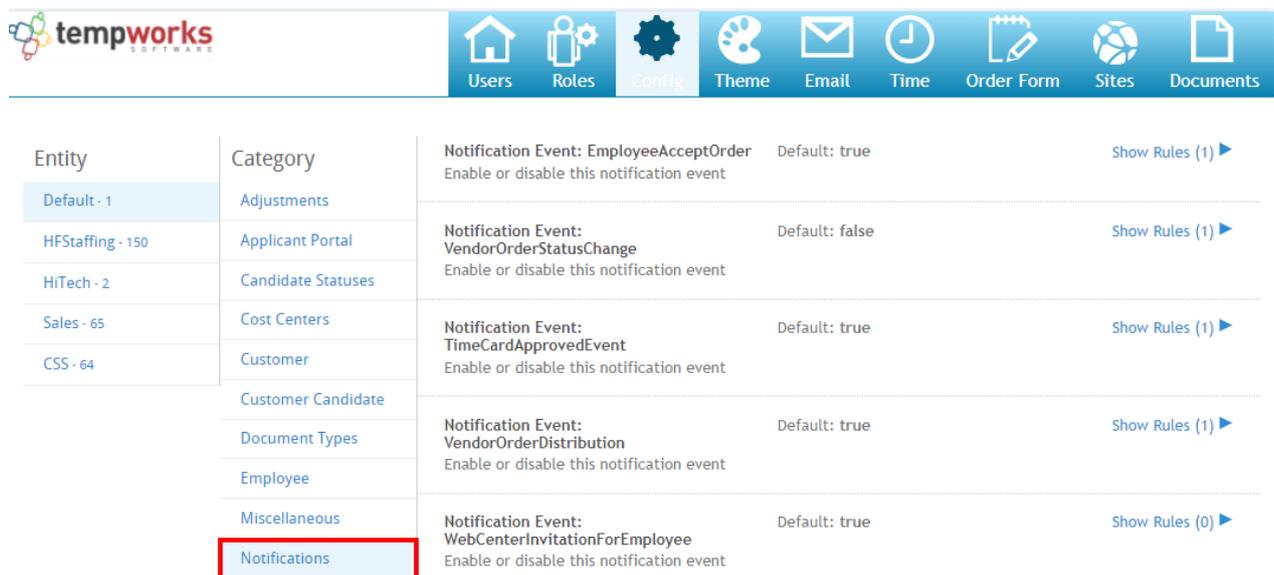
Setting up Notifications and Emails for Evaluations

Evaluations can give your staffing company insight to employees and their working conditions or gain useful feedback from clients about the workers you provide them. To ensure the evaluations are sent out properly, to the recipients you desire, this document will walk users through the process of properly setting up configurations within WebCenter.

Notifications

Note Make sure you have completed setting up the evaluation questions in Enterprise administration before completing the configurations in WebCenter.

Once the setup of evaluation questions have been completed, navigate to WebCenter administration, under the 'Config' tab, find the 'Notifications' category.



The screenshot shows the WebCenter Admin interface. At the top, there is a navigation bar with the 'tempworks SOFTWARE' logo and several icons: Users, Roles, Config (highlighted), Theme, Email, Time, Order Form, Sites, and Documents. Below the navigation bar is a table with the following columns: Entity, Category, Notification Event, Default, and Show Rules. The 'Notifications' category is highlighted with a red box.

Entity	Category	Notification Event	Default	Show Rules
Default - 1	Adjustments	Notification Event: EmployeeAcceptOrder Enable or disable this notification event	Default: true	Show Rules (1) ▶
HFStaffing - 150	Applicant Portal	Notification Event: VendorOrderStatusChange Enable or disable this notification event	Default: false	Show Rules (1) ▶
HiTech - 2	Candidate Statuses			
Sales - 65	Cost Centers	Notification Event: TimeCardApprovedEvent Enable or disable this notification event	Default: true	Show Rules (1) ▶
CSS - 64	Customer			
	Customer Candidate			
	Document Types	Notification Event: VendorOrderDistribution Enable or disable this notification event	Default: true	Show Rules (1) ▶
	Employee			
	Miscellaneous	Notification Event: WebCenterInvitationForEmployee Enable or disable this notification event	Default: true	Show Rules (0) ▶
	Notifications			

Notification Event: Evaluation Assignment Finished

Setting this configuration will allow notifications to be sent automatically after an assignment has ended. By default, this configuration is set to 'False.'

Notification Event:
EvaluationAssignmentFinished

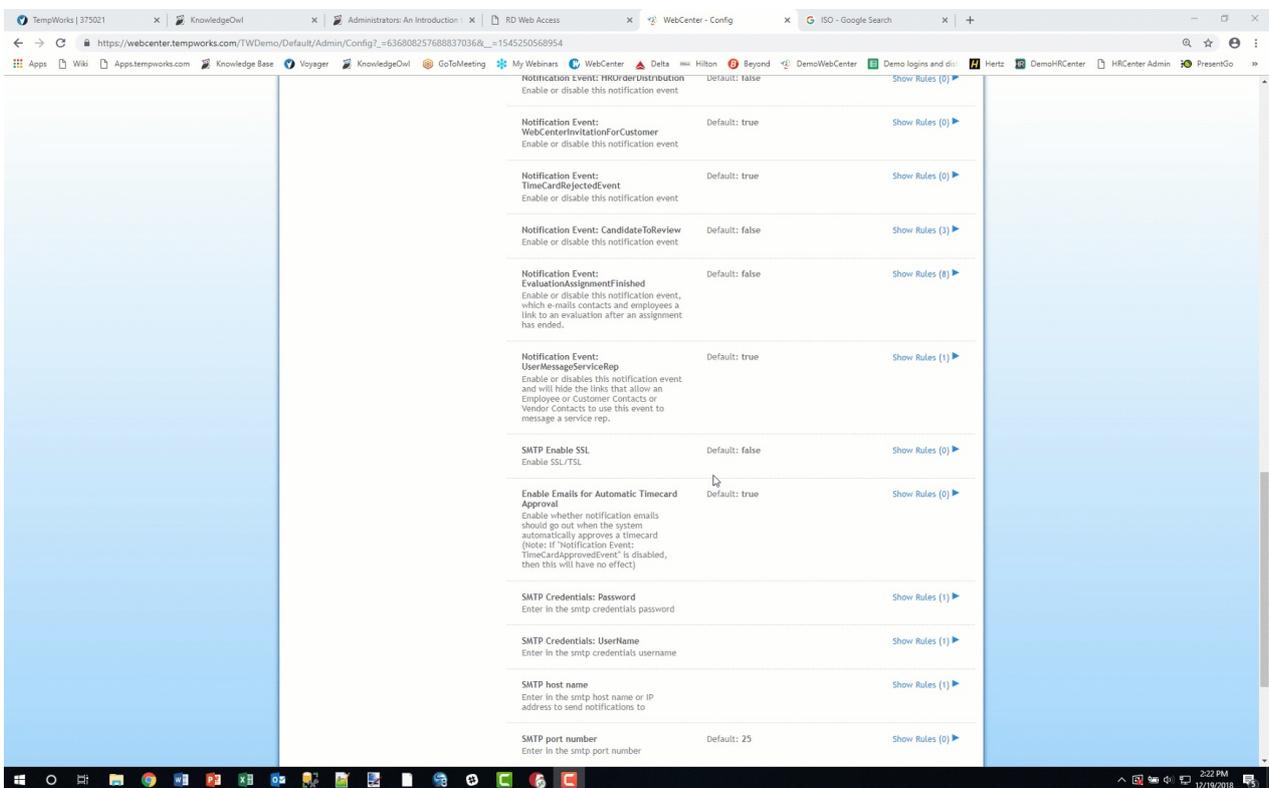
Default: false

[Show Rules \(6\) ▶](#)

Enable or disable this notification event, which e-mails contacts and employees a link to an evaluation after an assignment has ended.

Note This configuration is not dependent on any specific assignment status chosen within Enterprise.

To turn this configuration on, you will create a rule to decide who will receive the evaluations and enter filters to ensure evaluations are being sent to the proper receiver. Choosing 'When' allows users to filter between a Customer, User Role, Entity, etc. and create the parameters to enter in the 'is' section. Selecting 'True' applies the rule and turns the evaluation on.



Once this rule is created and assignments are finished, notification emails will be sent to either the employee or supervisor to complete the evaluation. To setup who will receive the evaluation, jump to the evaluation recipients configuration section of this article.

Notification Event: Evaluation Thank You

If you choose to send "Thank You" emails to recipients filling out the evaluations, you will need to set up the 'Notification Event: Evaluation Thank You' configuration. By default, this configuration will be set to 'False.' To turn this notification on you will need to create a rule and specify who should be receiving the notification.

Hours Evaluation is Available

You may setup a set amount of time the user has to complete an evaluation, navigate to the 'Hours Evaluation is Available' configuration. By default, the system has the configuration set to *one hour*. In the following example we can see that when the Customer "Is" Stearns Trailers they have 72 hours to complete the evaluation.

Hours Evaluation is Available Default: -1 [Hide Rules \(10\) ▼](#)

Changes the number of hours an exiting survey is available to an employee or customer contact

Rules

When: is Use: [Add Rule](#)

[Edit](#) When Customer is Stearns Trailers (4294999757) Default - 1 ✕

Use 72

Evaluation Recipients

When evaluations are sent out, by default, the employee and supervisor receive evaluation emails. If this needs to change, navigate to 'Evaluation Recipients' and create a new rule. Below, when Rocky Road Ice cream assignments are completed the evaluations are only sent to the supervisor based on the rule created:

Evaluation Recipients Default: Employee and Supervisor [Hide Rules \(14\) ▼](#)

Changes who will be automatically receiving evaluation e-mails after an assignment has ended.

Rules

When: is Use: [Add Rule](#)

[Edit](#) When Customer is Rocky Road Ice Cream (4294999876) Default - 1 ✕

Use Supervisor

Low Scoring Eval Message

Within Enterprise, the evaluation results will display on the customer or employee record. If a low score is associated with the evaluation, by default, the message will display 'Low Scoring Eval.' To change the verbiage, navigate to the 'Miscellaneous' category, open the 'Text displayed in front of low scoring evaluation' configuration and create a new rule.

Text displayed in front of low scoring Evaluation
Unique message that will show in front of the survey results in that users messages in Enterprise when they scored low on their survey.

Default: **** Low Scoring Eval ****

[Hide Rules \(3\)](#) ▼

Rules

When: is Use:

[Add Rule](#)

Edit	When Customer is 123 Main St. (4294989562) Default - 1	✘
	Use Low Score	
Edit	When Customer is A1 Car Wash (4294999883) Default - 1	✘
	Use Received a terribly low score	
Edit	When Customer is Crom Equipment (10623) Default - 1	✘
	Use Warning Low Score	

Email Template Creation

Once notifications are setup, users may select the format of the email templates being sent. Navigate to the 'Email' tab. Choose 'Employee' within the filter bar across the top and select your entity . Selecting the correct entity ensures the clients and employees associated within that hierarchy will see the correct templates created.

The screenshot shows the Tempworks software interface. At the top, there is a navigation bar with icons for Users, Roles, Config, Theme, Email, Time, Order Form, Sites, and Documents. Below this is a filter bar with tabs for All, Applicant, Employee, Contact, Vendor, ServiceRep, and Branch. The 'Employee' tab is selected. On the left, there is a list of entities: Default - 1, HFStaffing - 150, HiTech - 2, Sales - 65, and CSS - 64. The 'HFStaffing - 150' entity is selected. The main content area displays 'Email Notification Templates for HFStaffing - 150' and a table of templates.

Entity	Template Name	Description	Recipients	Action
Default - 1	ApplicationRegisteredNewUser Default	Sent when an applicant starts an application through AppPortal and receives login credentials	Applicant, Branch, Employee	Details
HFStaffing - 150	EvaluationAssignmentFinished Improved Eval template	Sent when an assignment ends to employees and contacts on that assignment.	Contact, Employee	Details
HiTech - 2	EvaluationThankYou Default	Sent when a user completes the evaluation.	Contact, Employee	Details
Sales - 65				
CSS - 64				

After the correct entity is chosen, select which template you wish to change.

Select 'Details' to view the default template.

Copying a Template

If you wish to modify the original template, select 'Copy.'

Once the copy is created, select 'Edit' to open the edit template window:

Default	Name	Description	
<input checked="" type="radio"/>	Default	Default template for the end of an assignment.	   Delete
<input type="radio"/>	Default - (Copy)	Default template for the end of an assignment.	   Delete
<input type="radio"/>	Improved Eval template	Default template for the end of an assignment.	

You may edit the copy of the default template and enter a new template title, description, and email subject. Within the body of the template, additional edits may be made.

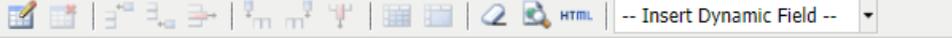
Edit Template

Template Title:

Description:

Email Subject:

A **ab** **B** **I** **U** Font Family Font Size

 -- Insert Dynamic Field --

##If--IsEmployee##

Feedback request for position: ##JobTitle##

In order to maintain our commitment to quality and service, we would appreciate your assistance in completing a quick evaluation form. Your feedback helps us improve our services. This form is strictly confidential. Thanks Again!

Company name: ##CustomerName##

Position: ##JobTitle##

Week ending: ##WeekEndDate##

Please click [here](#) to fill out the evaluation form.

Path: p

Select 'Preview' to verify all information is added in correctly.

From the preview template screen, select to 'Edit' or 'Save.'

After the template is saved, select the newly created template as your default to be sent when assignments are completed.

The screenshot displays the 'tempworks' software interface. At the top, there is a navigation bar with icons for Users, Roles, Config, Theme, Email, Time, Order Form, Sites, and Documents. Below this is a breadcrumb trail: All > Applicant > Employee > Contact > Vendor > ServiceRep > Branch. The main content area is titled 'Email Notification Templates for HFStaffing - 150'. On the left, there is a sidebar with 'Entity' options: Default - 1, HFStaffing - 150 (selected), HiTech - 2, Sales - 65, and CSS - 64. The main area lists several templates:

- ApplicationRegisteredNewUser** (Default): Sent when an applicant starts an application through AppPortal and receives login credentials. Recipients: Applicant, Branch, Employee. Details link.
- EvaluationAssignmentFinished** (Improved Eval template): Sent when an assignment ends to employees and contacts on that assignment. Recipients: Contact, Employee. Details link.
- EvaluationThankYou** (Default): Sent when a user completes the evaluation. Recipients: Contact, Employee. Details link.
- Ew2Invite** (New Template): Sent to invite an employee to sign up for electronic W-2's. Recipient: Employee. Details link.

The 'Improved Eval template' is expanded to show a table of templates:

Default	Name	Description	
<input type="radio"/>	Default	Default template for the end of an assignment.	
<input checked="" type="radio"/>	Improved Eval template	Default template for the end of an assignment.	View Edit Copy Delete

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