

Beyond - Managing Web User Account

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What is a Web User Account?

A web user account is the online account that is used by your employees for access to [WebCenter](#), [Buzz](#) and [HRCenter](#). In HRCenter It will allow them to apply to new job postings and fill out and update their paperwork. In WebCenter and Buzz they will be able to see their paychecks, check in as 'Available,' submit timecards, and so much more.

Creating web user accounts allows your employees to get the most out of your system and to communicate with you more effectively.

Note Employees that apply online through HRCenter will have their account made through that process. This article focuses on creating accounts for employees that are in your database but do not currently have credentials.

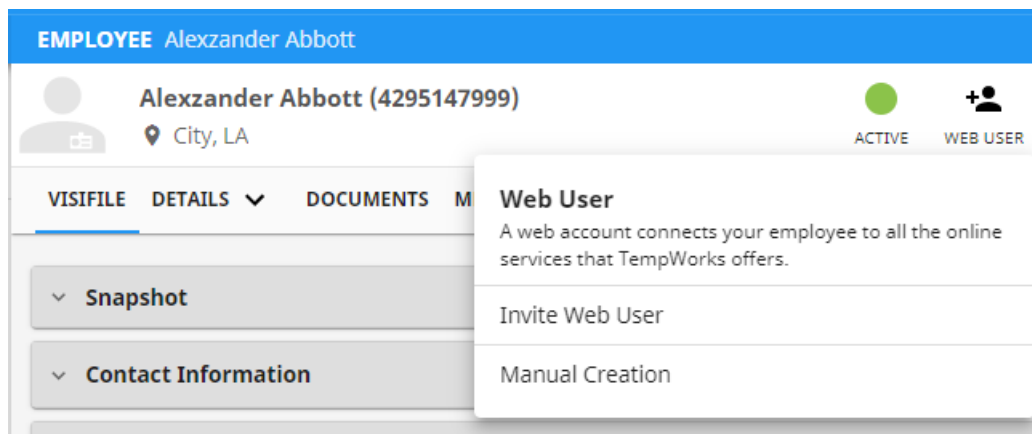
Inviting a Web User

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Invite" forms within both Employee and Contact to the Security Groups that require the functionality:

BY PAGE	BY FIELD	Access
Employee		<input checked="" type="checkbox"/>
Employee Header		<input checked="" type="checkbox"/>
Customer (1)		<input checked="" type="checkbox"/>
Contact		<input checked="" type="checkbox"/>
Contact Header		<input checked="" type="checkbox"/>

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

To invite a web user for a new or existing employee, navigate to the employee record, select the "Web User" charm, and select "Invite Web User":



The "Invite Web User" window will open, allowing you to either enter an email address (if the record does not have one on file), or move directly to selecting a role:

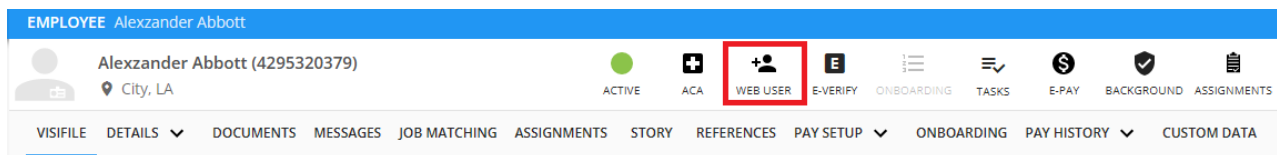
The 'Invite Web User' window is shown. It has a 'Role' dropdown menu with the following options: 'Applicant', 'Applicant - All Permissions', 'Applicant - Automation', and 'Automation Role'. The 'Applicant' role is selected. The window also has an 'Email' field with a checkmark icon and a 'Role' field with a '2' icon.

With the appropriate role chosen, select "Submit". The employee will then receive an email with further instructions on how to setup their account information.

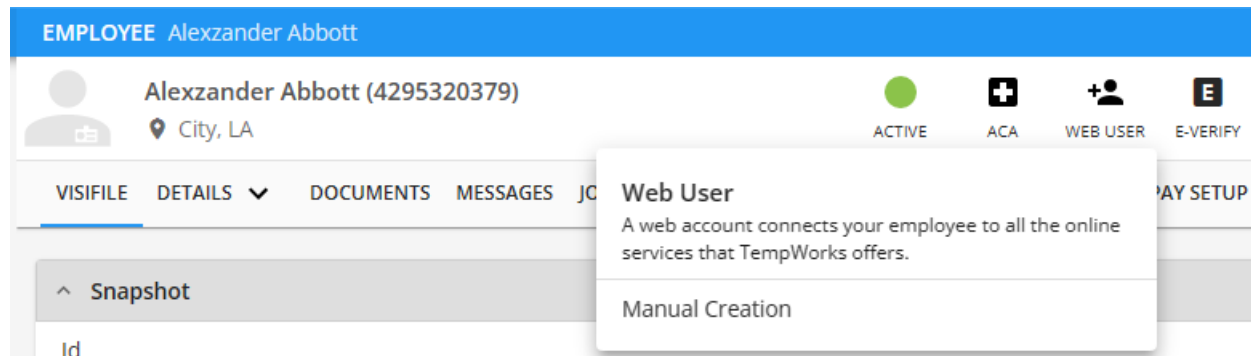
The 'Invite Web User' window is shown. It has an 'Email' field with a checkmark icon and a 'Role' field with a '2' icon. The 'Role' dropdown menu is open, showing the 'Applicant' role selected. At the bottom right, there are three buttons: 'CANCEL', '< PREVIOUS', and 'SUBMIT'.

How to Create a Web User Account

To create a web user account for a new or existing employee, you will need to first navigate to their employee record. Once you are on the employee's record you can click on the "Web User" charm:



When you select the web user charm, select manual creation to create an account:



Once "Manual Creation" is selected, the window will open, and the following fields will need to be filled out:

Manual Creation

* Username
alexander.abbott

* Password
untillasttrain

☒ Automatically Link Product Instances

The new Web User Account will be automatically linked to the appropriate Product Instances based on your current hierarchy.

SAVE AS DRAFT
CANCEL
SUBMIT

- **Username** - this will be the username that the employee will use to log in to WebCenter and/or HRCenter
- **Password** - a random password will be automatically generated, but you can manually type any password you would like to be used for their initial password.
 - This icon allows you to re-generate a random password
 - This icon will copy the password to your clipboard so that you may save it to a word document or email it to the employee.
- **Allowed Products** - you may determine what products the account should have access to with this user account. By default, the Automatically link product instances will be selected. If you want to manage each product instance, deselect this option and customize the options below:



Manual Creation

* Username

alexzander.abbott

* Password

untillasttrain

☐ Automatically Link Product Instances

Allowed Products

☐ WebCenter

☐ HRCenter

☐ Buzz App

☐ Job Board

SAVE AS DRAFT

CANCEL


SUBMIT

Once the potential web user has been given the above items, select the 'Submit' button. The user now has a web user account and has access to the distributed products.

Managing a Web User Account

Once the account is made, the 'Web User' charm will display different functionality when directly interacted with:

EMPLOYEE Christopher Robin (4295097670) / Reports



Christopher Robin (4295097670)

SSN: 121-44-5132 · City, MN 55125

ACTIVE

ACA

WEB USER

E-VERIFY

VISIFILE

DETAILS

DOCUMENTS

MESSAGES

PAY SETUP

Web User

A web account connects your employee to all the online services that TempWorks offers.

View Account Details

Change Username

Change Role

Manage Password

Employ

Showing

Displays a list of employees with their Insight survey results.

To view the user's web account page, select 'View Account Details.' From here, two cards can be interacted with:

1. Web User Details - Controls their web user account as a whole providing the ability to change username, change role, and manage their password:

Web User Details

Active

Username christopher.robin	Role Employee - All Permissions
Last Login Wed January 22nd, 2020 at 3:31 PM	
CHANGE USERNAME >	
CHANGE ROLE >	
MANAGE PASSWORD >	

The web user's account can be rendered inactive by adjusting the active switch.

2. Web User Products- Products the employee/contact has access to & the last date they logged in

Web User Products			
 Buzz App companion-qa	Recent login: --		⋮
 Job Board HiTechQA			⋮
 WebCenter HiTechQA	Recent login: --		⋮
 HRCenter tworika-qa	Recent login: --		⋮

Changing a Web Username

A web user's name can be changed by interacting with the web user charm and selecting "Change Username".

This will open the 'Change Username' wizard. Here, their username can be changed and submitted:

Change Username

Username

christopher.robin

SAVE AS DRAFT

CANCEL

SUBMIT

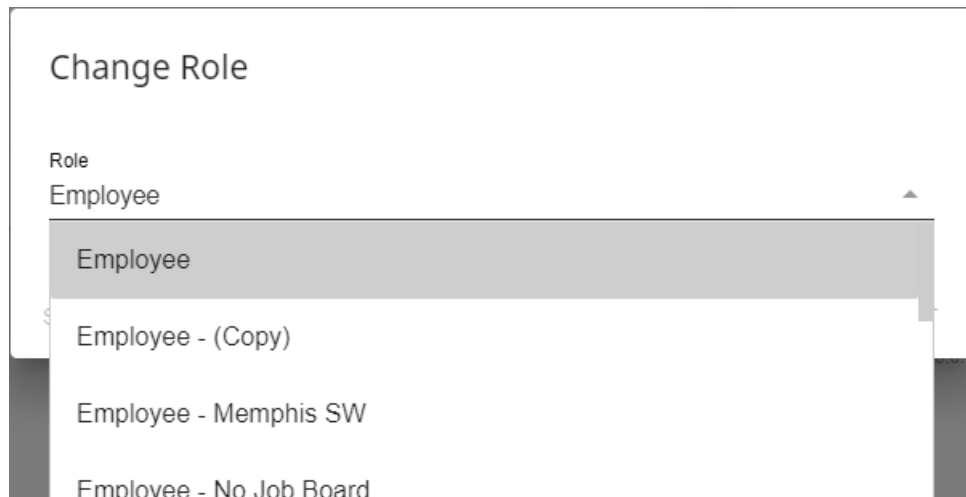
Changing a Web Users Role

A web users role defines what their experience will look like when interacting with WebCenter. These are typically set up by your WebCenter admins. They may limit or expand how much of WebCenter an individual user might have access to.

For example, a basic employee may be able to check their pay stubs or look at their assignment and not much else. A deluxe employee may be given access to WebCenter timecards as well.

To change a web users role select "Change Role".

This will reveal a wizard displaying the employee's current role and a drop-down of all available roles in your system:



Note To better understand your available roles work with your WebCenter admin.

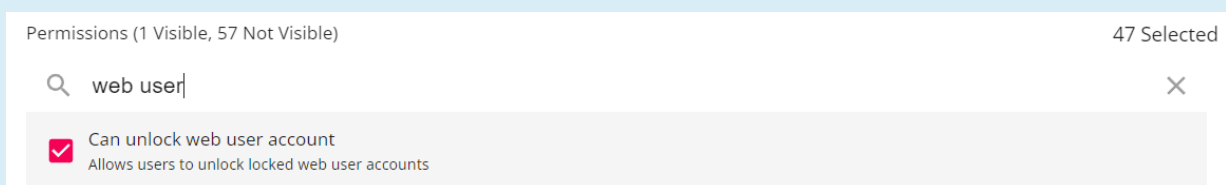
Changing a Web User's Password

A web user's password can be changed by interacting with the 'Web User' charm and selecting "Manage Password".

Unlocking a Web User Account

The ability to unlock an employee's web user account has been added to Beyond so long as you have the proper permission.

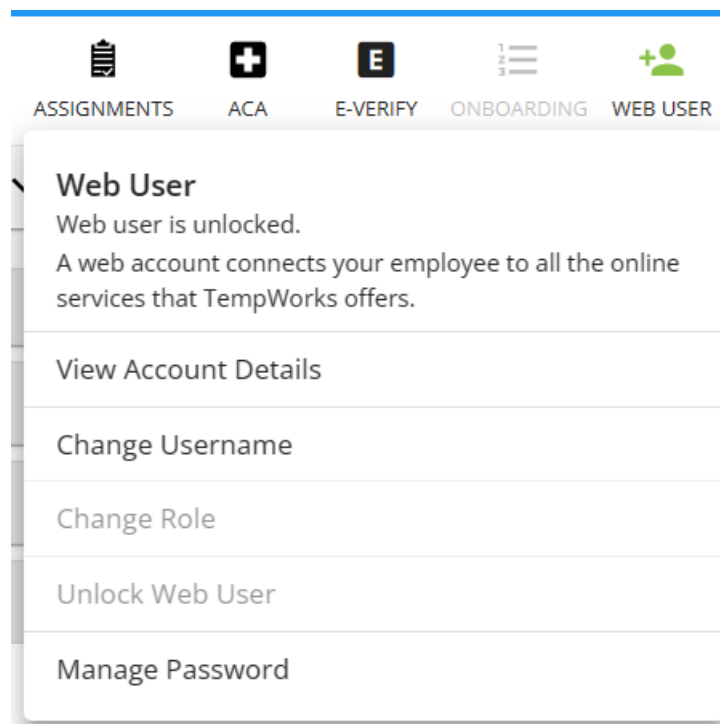
Note Users will need to have the "Can unlock web user account" permission in order to access this functionality:



For more information on adding permissions to Security Groups, please see the following article titled [Beyond - Managing Security Groups](#).

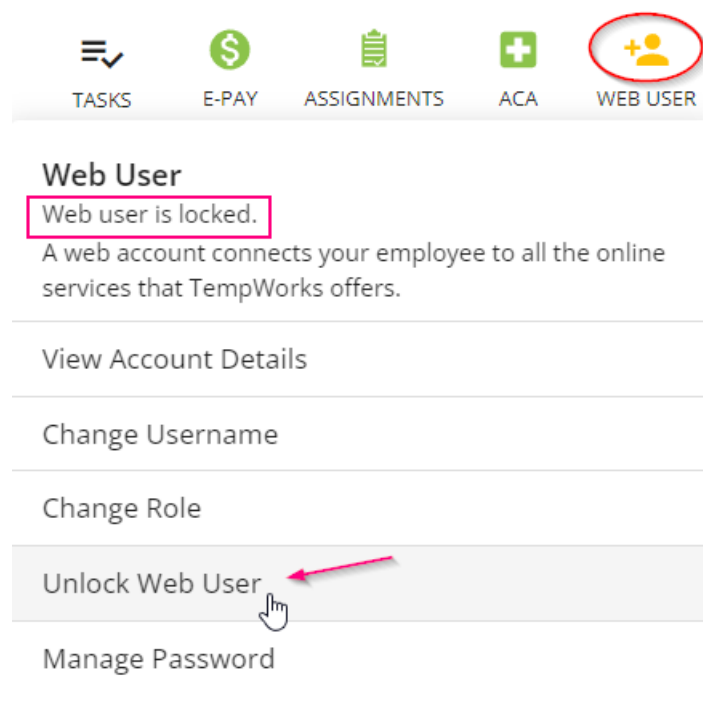
With the aforementioned permission granted, selecting the "Web User" charm on an employee or contact record

that is **green** will show that the web user account is currently "Unlocked":



If the "Web User" charm is **yellow**, the web user account is currently locked.

Select "Unlock Web User" and that account will be unlocked on WebCenter:



Additionally, you can view the status of a web user account from the "Web User Details" card of the respective employee or contact details page:


Web User Details

Active

Username	sandy.johnson	Role	Employee - All Permissions
Last Login	Mon April 10th, 2023 at 5:56 PM	Status	Locked

CHANGE USERNAME >

CHANGE ROLE >


UNLOCK WEB USER 

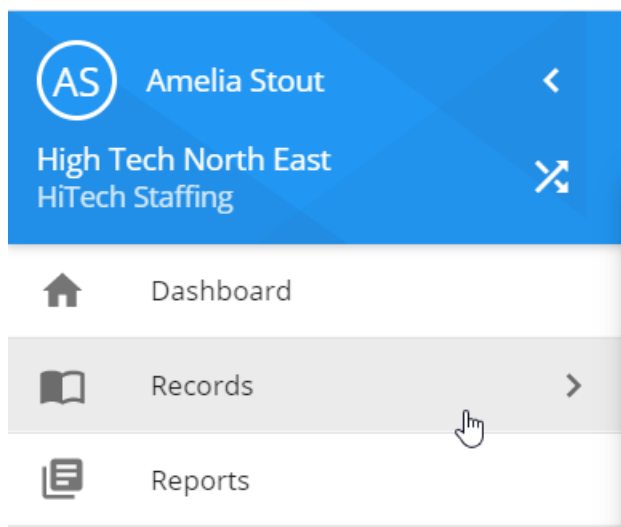
MANAGE PASSWORD >

Searching Based on Web User Accounts

If you need to find employee or web user information based on a web user account or email, you can use the Web User Search option.

To Find the Web User Search:

1. Navigate to the  menu in the upper left
2. Select Records



3. Choose Web User Search

Search

Employee Search

Customer Search

Contact Search

Prospect Search

Job Order Search

Assignment Search

E-Verify Search

Onboarding Search

Search Near Me

Web User Search

4. Here you will be able to search by all or part of the user's name or email.

Reports / Web User Search

Username

Email Address

a

RESET

SEARCH

Search returned 290 results

Username	Name	Email	Branch	Is Active
asdf1234	1234, ZZasdf	asdf1234@noname.com	Eagan	✓

- Tap the employee's name to be taken to their record on the web user account information.
- Tap on the email address to send an email. Check out [Beyond - How to Email in Beyond](#)

Additional Helpful Search Fields:

You can also add web user login criteria to any of your employee advanced searching.

1. Navigate to Employee Search
2. Click Advanced
3. Choose the + Rule to add a new rule
4. Type "Login" to see a drop down of login options to search by

5. Choose whether you want to look for logins before/after/equal to a date
6. Choose a date to search by
7. Click Search

Example: Showing active employees who have not logged into Buzz since 4/1/2020

Search / Employees / Advanced

BASIC

ADVANCED

☰ Click to select a saved search... ^

☐ NOT **AND** OR

☰ > Is Active X ▾ IS TRUE ▾ ☒ Show in results X

☰ > Buzz Last Login X ▾ IS BEFORE ▾ 4/1/2021 X X

☐ Show in results

+ RULE / GROUP

SAVE...

RESET

SEARCH

Beyond will only save logins from the last two months.

Related Articles