Core - Security Role Overview

What is a Security Role?

Security roles (also known as sec roles) define what a service rep (user) has the ability to interact with in Core

On a broad scale, security roles allow certain service reps access to the Pay/Bill or Administration modules of Core while others (without the related role) will not be able to access that area of the software. Additionally, security roles define what types of reports reps will have access to. For example, it may be beneficial for recruiters to have access to the *Employee Info* report group, but not the *Financial* report group. Security roles allow this type of distinction to be made.

On a more narrow scale, security roles can allow service reps to interact with very specific functionality in Core.

For more information on Core, see Welcome to TempWorks Core.

List of security roles and general functions in Core:

Below is a list of each security role available in Core and a brief description of the roles purpose. To assign a user a security role, see Core - Assigning Security Roles.

Front Office

Recruiter

> Recruiters are managing the employees in your database. They add new employee records, monitor employee statuses and information, and assign employees to orders made by your sales team at the customer's request. For recruiter related articles check out Welcome to Core for Recruiters to get started.

Sales

Sales people are trying to draw in new business. They are adding and managing customer records trying to recruit new businesses to work with your staffing company. Sales also creates new orders in the system when customers request employees. Those orders are then handed off to the recruiter to fill the order. For sales related articles check out Welcome to Core for Sales to get started.

Full Desk

Full desk users are often branch managers or users that will bounce between sales and recruitment. They will have the functionality for both recruitment and sales responsibilities. For full desk options check out both Welcome to Core for Recruiters & Welcome to Core for Sales.

Front Office - Admin

The front office admin role gives a user access to some administration tools to help manage information for other front office users. They will be able to add additional options for fields front office users fill out often and audit the system to ensure all information is being filled out correctly. For front office admin options, check out Welcome to Core for Admins.

Back Office

Pay Clerk Lite

Regular pay clerks should be given this role. This allows them to run through the payroll processes including time entry, proofing, and payroll runs. This role can also see and edit pay information including adjustments, For pay clerk options, check out Welcome to Core for Payroll & Billing Clerks.

Pay Clerk

This role is designed for an experienced pay clerk (usually a lead or manager). They can do everything that is provided by the pay clerk lite role as well as additional functionality including check corrections, abandoning payroll runs, approving payroll errors, etc. For pay clerk options, check out Welcome to Core for Payroll & Billing Clerks.

Billing Clerk

Billing clerks manage the billing side of back office. They can create transactions, proof, and process invoices. For billing clerk options, check out Welcome to Core for Payroll & Billing Clerks.

Pay & Bill Clerk

This role is for users who do both billing and payroll functions. They will have access to payroll and billing functionality to be able to accomplish both roles. This role may also be assigned to a manager for payroll/billing. For pay/bill clerk options, check out Welcome to Core for Payroll & Billing Clerks.

Back Office - Admin

The back office admin role gives a user access to some administration tools to help manage back office functions. They will have access to the administration section of TW Core where they can set up custom data fields, worker comp codes, and adjust information as needed for back office processors. For back office admin options, check out Welcome to Core for Admins.

Misc.

System Admin

The system administrator is typically someone found at your HQ or main branch. This person will have complete access to your system allowing them to manage a lot of the options and settings found under administration. There typically are only a handful of administrators at any organization because they can see and make changes to the greatest amount of information. For admin options, check out Welcome to Core for Admins.

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