

Enterprise - Managing Service Rep Web User Accounts

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Service Rep Web User Accounts

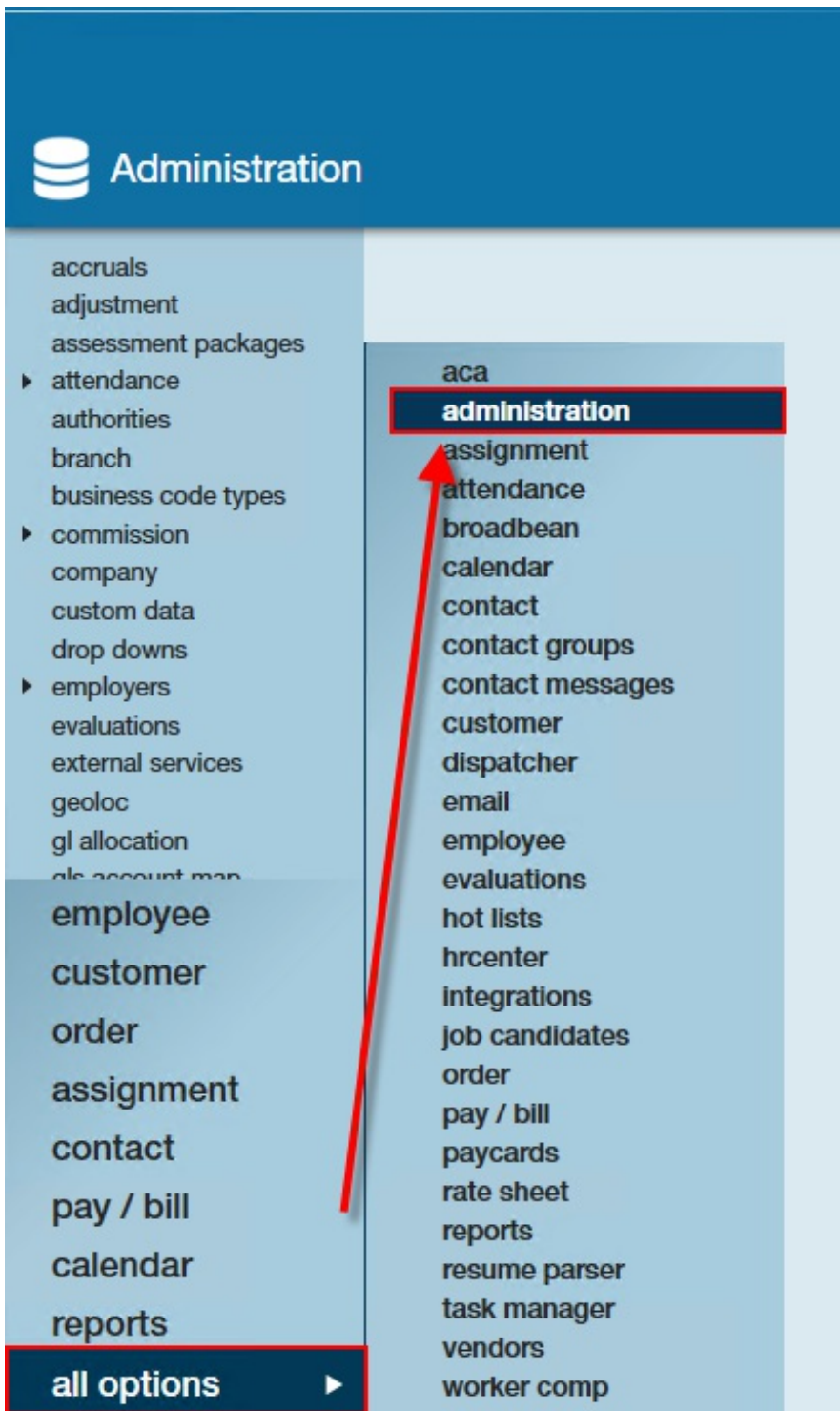
Service reps can be given web user credentials, this will allow them to log into both HRCenter™ and WebCenter™, depending on the setup. Service reps with credentials are able to interact with both modules in different ways.

- **HRCenter-** A service rep with a web user account can process [recruiter first workflows](#). These workflows/pages can be interacted within HRCenter.
- **WebCenter-** A service rep with a web user account can access the WebCenter admin portal. Depending on the user role given to your service rep, they will be able to interact with the admin portal in a number of ways. Some examples may include impersonating other web users, setting configs, creating email templates, and creating WebCenter timecard templates.

Note If you are using Enterprise to pay your internal employees and using WebCenter to manage them, your service reps will need two sets of credentials. One will reflect their employee record on the staff side of your company; the other set would be their service rep credentials.

Creating Credentials

To grant a service rep access to your TempWorks web modules, navigate to the 'administration' section in the navigation tree:



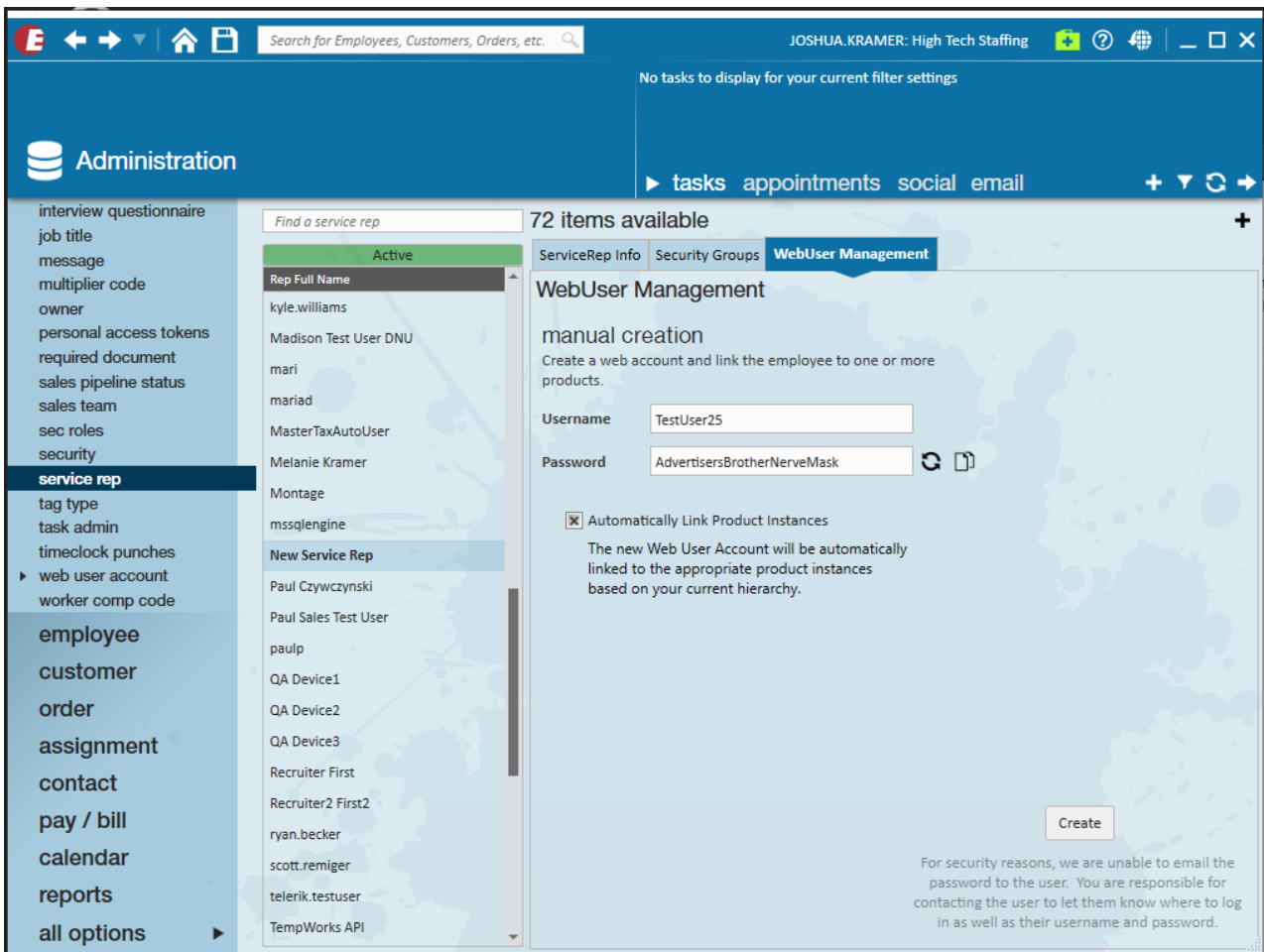
From here, select the 'service rep' form from the options on the left. This form will display all service reps within your system.

Select the service rep from the list you wish to make credentials for:


The screenshot shows a web application interface for 'Administration'. The top navigation bar includes a search bar with the text 'Search for Employees, Customers, Orders, etc.' and the user name 'JOSHUA, KRAMER: High Tech Staffing'. Below the navigation bar, there are tabs for 'tasks', 'appointments', 'social', and 'email'. The main content area is divided into three sections:

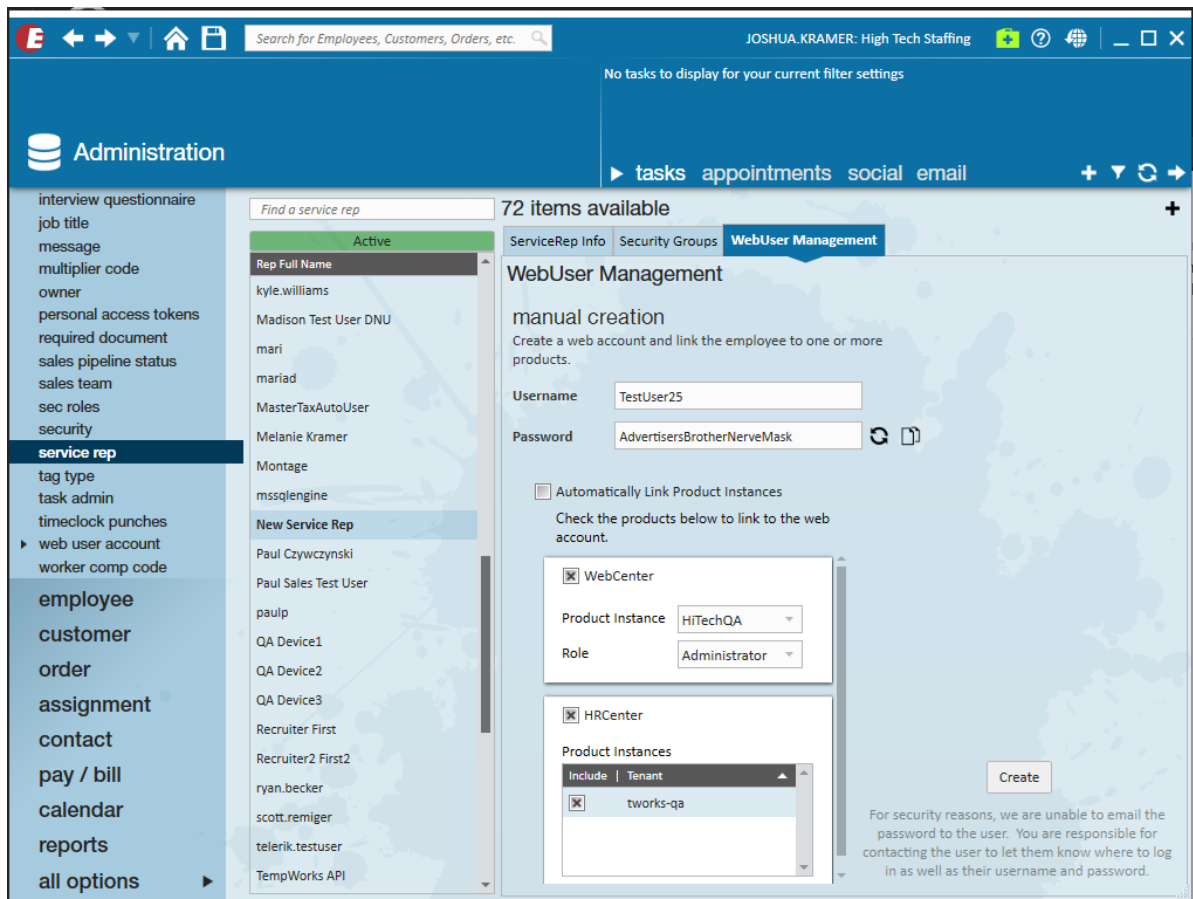
- Left Sidebar:** A list of administrative functions including 'interview questionnaire', 'job title', 'message', 'multiplier code', 'owner', 'personal access tokens', 'required document', 'sales pipeline status', 'sales team', 'sec roles', 'security', 'service rep' (highlighted), 'tag type', 'task admin', 'timeclock punches', 'web user account', 'worker comp code', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', 'calendar', 'reports', and 'all options'.
- Search Results:** A search bar with the text 'Find a service rep' and a list of 72 items available. The list is filtered to show 'Active' service reps, including 'kyle.williams', 'Madison Test User DNU', 'mari', 'mariad', 'MasterTaxAutoUser', 'Melanie Kramer', 'Montage', 'mssqlengine', and a 'New Service Rep' section with entries like 'Paul Czywczynski', 'Paul Sales Test User', 'paulp', 'QA Device1', 'QA Device2', 'QA Device3', 'Recruiter First', 'Recruiter2 First2', 'ryan.becker', 'scott.remiger', 'telerik.testuser', and 'TempWorks API'.
- Main Rep Info Form:** A form for creating a new service rep. It includes tabs for 'ServiceRep Info', 'Security Groups', and 'WebUser Management'. The 'Reps Hierarchy' section has dropdowns for 'Hier ID Allowed' (System), 'Hier ID' (High Tech Staffing), and 'Branch ID' (High Tech NW). The 'Main Rep Info' section includes fields for 'SRIdent' (0), 'Active' (checked), 'Rep Name' (Test User), 'Rep Full Name' (New Service Rep), 'Initials', 'EINC' (0), 'Email', 'Phone Number', 'Order Type' (Temp), 'Sales Team ID' (None), 'Time Zone' (Central Standard Time), 'Use Daylight Savings' (checked), 'Web Portal System' (unchecked), and 'Employee'.

Once a user has been selected, click on the 'WebUser Management' tab at the top. Here, you will be able to manually create credentials for this service rep:



Credentials must include:

1. Username: The username must be unique.
2. Password: The password must contain 8 characters. A unique password can be generated by selecting the  button.
3. Product Instance: You will be presented with two options. The first, which is also the default, is 'Automatically Link Product Instances'. This tells the software to automatically provide appropriate WebCenter and HRCenter product instances to the Web User that is being created. The second is to manually add product instances. This is where you will be able to choose the specific product instance along with the intended role for WebCenter and tenant for HRCenter.



4. Role: This will be used if you chose to manually link product instances. This defines what the service rep will have access to in WebCenter. It is recommended that typical service reps be given an "AdminLight" role, while reserving "Admin" for users that would be involved in configuring WebCenter.
5. Tenant: This will be used if you chose to manually link product instances. This is the [web tenant](#) the service rep will have access to. It is most common the user has only access to a single tenant however, provided your system has multiple instances of web modules, you might give the service rep access to any or all of those tenants.

Once you have provided all the information for the web user account, select the 'Create' button.

You are now responsible for relaying the service reps credentials to them.

Modifying a Service Rep's Web User Account

If a service rep needs their password or role updated, the 'WebUser Management' tab can be used to do so. Users with existing credentials can have those credentials edited within

this tab.

Resetting a Password

To update or reset a service rep's password, select the 'Reset Password' button:

The screenshot shows a web application interface for 'WebUser Management'. At the top, there are three tabs: 'ServiceRep Info', 'Security Groups', and 'WebUser Management' (which is selected). Below the tabs, the title 'WebUser Management' is displayed. The main content area shows user details for 'Alexander.swanson25'. The 'Username' field contains 'Alexander.swanson25'. The 'Password' field has a 'Reset Password' button. The 'Status' is 'Active' (indicated by a green button). The 'Last Login' is 'Hasn't logged in yet'. Under 'Linked Products', there are two sections: 'WebCenter' and 'HRCenter'. The 'WebCenter' section has a checked checkbox, 'Product Instance' set to 'HiTechQA', and 'Role' set to 'AdminLight'. The 'HRCenter' section has a checked checkbox and a 'Product Instances' list containing 'tworks-qa'.

This will open the 'reset password' wizard:



reset password

Username




Email Reset Link

Email

Enter New Password

Password  

Display New Password Report

  Cancel  Save

There are two options when resetting a password:

1. Sending the service rep an email link directing them to HRCenter. From here, they will be allowed to reset their own password.
2. A new password can be manually created for the service rep.

After selecting the desired option, select the 'Save' icon to continue:

reset password

Username

Email Reset Link

Email

Enter New Password

Password

Display New Password Report

Click the Save button to change the user's password.

Cancel Save

Changing a Role

If desired, a service rep's role may be updated. Updating this will affect the scope of access they have as an administrator in WebCenter. Service rep's that have web user accounts for the purposes of having access to HRCenter should have very limited access to the administrator portal. Those that are in charge of making changes to WebCenter as a whole will typically be given standard access.

Note Additional roles can be added by those with full access to the admin portal.

3 items available

ServiceRep Info Security Groups **WebUser Management**

WebUser Management

Username Alexander.swanson25

Password

Status Active

Last Login Hasn't logged in yet

Linked Products

- WebCenter
 - Product Instance: HiTechQA
 - Role: AdminLight
 Administrator
- HRCenter
 - Product Instances
 - Include | Tenant
 - tworks-qa

Activating/Deactivating a Web User Account

Over the course of a service rep's career, it may be necessary to deny them access to WebCenter/HRCenter. To do so, simply interact with the 'Activation Status' toggle.

3 items available

ServiceRep Info Security Groups **WebUser Management**

WebUser Management

Username: Alexander.swanson25

Password:

Status: **Active**

Last Login: Hasn't logged in yet

Linked Products

- WebCenter
 - Product Instance: HiTechQA
 - Role: AdminLight
- HRCenter
 - Product Instances
 - Include | Tenant
 - tworks-qa

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