New User Setup Guide

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Overview

When creating/managing users that will be utilizing TempWorks products and services, the information within this article can be used as a handy checklist and reference point to ensure your service representatives have the appropriate permissions and access.

This article covers the following:

- 1. Creating New Users in Bridge
- 2. Managing Service Reps in Enterprise
- 3. Security Roles in Enterprise
- 4. Web User Accounts for Administration
- 5. Managing Service Reps in Beyond
- 6. Security Groups in Beyond

Creating New Users in Bridge

Begin by creating new users within Bridge by starting fresh or copying from an existing user.

Clear Search	+ Create New User		
Status:	Q Search		
Branch:	Darek Wolke2 Darek.Wolke2	High Tech NE Hier Level Allowed: System (1)	Last Login: Dec 28, 2018
	Dominic Reinke2 Dominic.Reinke2	High Tech NE Hier Level Allowed: System (1)	Last Login: Dec 31, 2018
	Henry Smiths Henry.Smiths	High Tech NE Hier Level Allowed: High Tech NE (64)	Last Login: Long ago

Consider copying an existing user with similar permissions to avoid doing a lot of manual updates for each user (Hierarchy Security Roles/Groups).

Note For more information, please see the article titled Managing Users in Bridge.

Managing Service Reps in Enterprise

Once users have been created within Bridge, their service representative accounts can be managed through Enterprise.

Main Rep Info	
SRIdent	0
Active	×
Rep Name	
Rep Full Name	New Service Rep
Initials	
EINC !	· · · · · · · · · · · · · · · · · · ·
Email	
Phone Number	
Order Type	Temp
Sales Team ID	Default
Time Zone	· · · · · · · · · · · · · · · · · · ·
Use Daylight Savings	
Web Portal System	

The information able to be updated includes allowed hierarchy, display name, email, phone number, default order type, sales team and time zone.

Note For more information, please see the article titled Enterprise - Managing Your Service Reps.

Security Roles in Enterprise

Security Roles, or "Sec Roles", are used to determine what functionality a user has access to in TempWorks Enterprise; this includes which reports can be accessed and which fields can viewed/modified/saved.

			► tasks appointments social email + ▼ C
interest code	Find a service rep	sec ro	
interest code subcategory		36010	oles /
interview questionnaire	Active	Sec Role	e Description 🔺
ob title	795 items available	AC	A/R Clerk
nessage	Aaron Jurrens	AS	A /D Clark Cash Basting
multiplier code	Aaron Nottestad	AS	A/R Clerk Cash Posting
owner	Abby Brown Abby Gray	AS	A/R Supervisor
personal access tokens	Abby Raleigh	AA	ACA General User
required document	Abdi Ahmed	AJ	ACA Super User
sales pipeline status	Adam Eckdahl Administrator		
sales team	Alan Anderson	AE	Account Executive
sec roles	Alec Nigh	AR	Accounts receivable
security	Alec Wojciechowski Aleksandra Marinova	AI	Actions - Import Module
service rep	Alex Binenstock	AI	
	Alex Kittelson	SU	Allow SuperUserMode
ag type	Alex LaVone	AP	AP Bill
ask admin	Alex Quintela		
timeclock punches	Alex Regan	A	Applicant Center

If you copied a user from Bridge, these should be set up for you already. If you created a new user, or needed to update their individual permissions, these can be managed within Enterprise.

Note Security settings in Enterprise (Sec Roles) are separate from security in Beyond (Security Groups). When editing, adding users, or managing security groups, we recommend being at your highest hierarchy available (ex. system).

Note For more information, please see the article titled Enterprise - Security Roles.

Web User Accounts for Administration

If this new user will be responsible for administration of HRCenter or WebCenter, they will need a Web User account created for their TempWorks login (this is independent of any Web User account for their respective employee record).

() ← → ▼ ☆ ()	Search for Employees, Customers, Orders,	etc. 🔍	JOSHUA.KRAMER: High Tech Staffing	主 💿 🐗 _ 🗆 🗙		
			No tasks to display for your current filter settings			
			▶ tasks appointments social email	+ 7 C +		
interview questionnaire	Find a service rep	72 items av	vailable	+		
job title message	Active	ServiceRep Info	Security Groups WebUser Management	•		
multiplier code owner	Rep Full Name Avide Avid	WebUser I	Management			
personal access tokens	Madison Test User DNU	manual cr	reation			
required document sales pipeline status	mari	Create a web a products.	ccount and link the employee to one or more	(• •		
sales team	mariad	Username				
sec roles	MasterTaxAutoUser	Username	TestUser25			
security	Melanie Kramer	Password	AdvertisersBrotherNerveMask 🛛 🖸			
service rep tag type task admin timeclock punches	Montage mssqlengine		itically Link Product Instances v Web User Account will be automatically			
 web user account worker comp code 	New Service Rep Paul Czywczynski Paul Sales Test User	linked to	o the appropriate product instances n your current hierarchy.			
employee	paulp					
customer	QA Device1					
order	QA Device2					
assignment	QA Device3					
contact	Recruiter First					
pay / bill	Recruiter2 First2 ryan.becker			Create		
calendar	scott.remiger		For security reaso	ns, we are unable to email the		
reports	telerik.testuser			user. You are responsible for to let them know where to log		
all options	TempWorks API			ir username and password.		

Administrative Web User accounts will need to be setup/configured within Enterprise.

Note For more information, please see the article titled Enterprise - Managing Service Rep Web User Accounts.

Managing Service Reps in Beyond

Once users have been created within Bridge, their service representative accounts can be managed through Beyond.

B < Settings / <u>Syst</u>	em Sel	ttings / Service Repres	sentatives				C Bookma
Advanced Search		Create and edit se	rvice representatives	at or below your curre	ent hierarchy level. No	ote: service reps cannot be deleted; only deactivated.	+
Content		Full Name 🛧	Id	Hierarchy Allow	Status	Teams	
External Service		Filter	Filter	Filter	Filter	Filter	
Insight Widgets		A Hill	21801	System	Inactive		
Interest Codes		Aaron Jurrens	26574	System	Active		
Job Titles		Aaron Moline	21761	High Tech Staffing	Inactive	Admin	:
On-Site Time Clock Invite Codes		Aaron Nottestad	21775	High Tech Staffing	Active	DSP Recruiters	:
Pay Setup		aarond	21958	System	Active		
Product Instances		abbasr	21696	System	Inactive		
Proofing Error Management		Abby Brown	25395	System	Active	Team Jason	
Reference Questions		Abby Gray	26598	System	Active		
Required Document Types		Abby Raleigh	26438	System	Active	St Paul Branch Service Reps	
Sales Teams		Abdi Ahmed	26625	System	Active		
Security		Adam Eckdahl	26706	System	Active		
Service Rep Teams		Adam Helgeson	21924	System	Inactive		
Service Representatives		Adeel	21866	System	Active		

Within the "Service Representatives" screen, you are able to assign users their applicable Security Groups for Beyond, as well as assign them to any Teams you have created (if applicable).

Note For more information, please see the following articles:

- Beyond Managing Your Service Representatives
- Beyond Creating & Managing Service Rep Teams

Security Groups in Beyond

Security groups allow you to set security permissions for each user within Beyond.

B < Settings / / Pe	rmissions				D Bookmark
Product Instances	Permission security groups are used to gra	nt service representatives sets of user permissions. Note that	service reps may be	a member of only one of this type of security group.	+
Proofing Error Management	Name	Description	System Default \downarrow	Hiererchy	
Reference Questions	Filter	Filter	Filter	Filter	
Required Document Types	TempWorks Default - Administrator	Group for Administrators with all necessary permissions.	\oslash	System	:
Sales Teams	TempWorks Default - Back Office Manager	Managerial group with all applicable back office permissions.	\oslash	System	:
Security ^	TempWorks Default - Billing Clerk	Permission group for standard Billing Clerk role.	\otimes	System	:
Authentication 🗸	TempWorks Default - Front Office Manager	Managerial group with all applicable front office permissions.	\otimes	System	:
Custom Data	TempWorks Default - Limited Access	Base permission group with very limited functionality.	\otimes	System	:
Customer Statuses	TempWorks Default - Pay Clerk	Permission group for standard Pay Clerk role.	\otimes	System	:
Document Types	TempWorks Default - Sales	Permission group for standard Sales role.	\otimes	System	:
Insight Widgets	TempWorks Default - Staffing Specialist	Permission group for standard Staffing Specialist role.	\otimes	System	:
Message Action Types	Whippy - Permissions	Default security group to allow Whippy to create contact messages on	\oslash	System	:
Open API Custom Integrations	A test	All Permission	\otimes	System	:
Permissions	Admin (limited)	Has admin permissions but limited access to	\otimes	System	:
Advanced Permissions	AJ's Administration Permission	All Permission	\otimes	System	:
Reports	All Permissions	All Permissions	\otimes	System	:
Reports			~		

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Note Security settings in Enterprise (Sec Roles) are separate from security in Beyond (Security Groups). When editing, adding users, or managing security groups, we recommend being at your highest hierarchy available (ex. system).

Note For more information, please see the following article titled Beyond - Managing Security Groups.

Note Beyond also allows for the creation and utilization of Security Groups with Advanced Permissions.

Security Groups with Advanced Permissions are strictly for **revoking access to specific elements** and should not be used to grant access to anything.

Advanced Permissions Security Group		
* Name Sourcing Specialists		
Description Used for those who source candidates		
BY PAGE BY FIELD	Sel	ecting a parent selects children 🧹
✓ Global		
➤ Dashboard Page		✓ Access
✓ Employee		Access
✓ Customer		Access
✓ Contact		Access
✔ Job Order		Access
 Assignment 		Access
Y Prospect		Access
Vandar		Access
Members (0)		+
	No members added yet	
SAVE AS DRAFT		CANCEL SUBMIT

For more information, please see the article titled Beyond - Creating Security Groups with Advanced Permissions.

Related Articles