

New User Setup Guide

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Overview

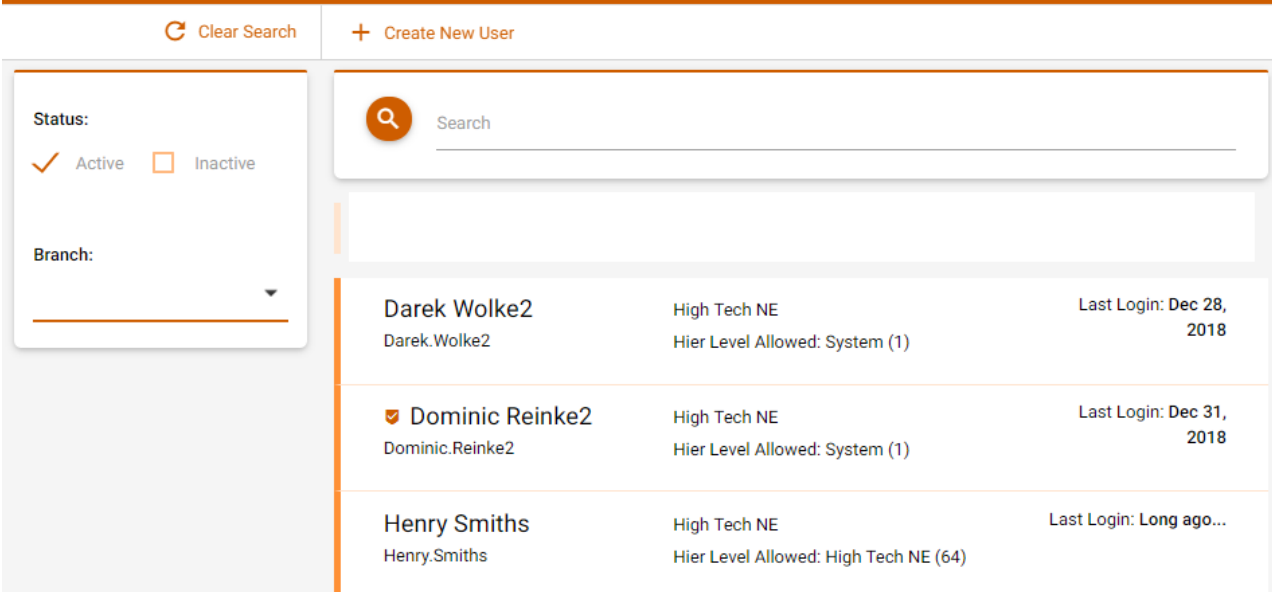
When creating/managing users that will be utilizing TempWorks products and services, the information within this article can be used as a handy checklist and reference point to ensure your service representatives have the appropriate permissions and access.

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.



The screenshot displays the Bridge user management interface. At the top, there are buttons for 'Clear Search' and 'Create New User'. On the left, there are filter sections for 'Status' (with 'Active' checked and 'Inactive' unchecked) and 'Branch'. The main area shows a search bar and a table of users.

Name	Branch	Hier Level Allowed	Last Login
Darek Wolke2 Darek.Wolke2	High Tech NE	System (1)	Dec 28, 2018
<input checked="" type="checkbox"/> Dominic Reinke2 Dominic.Reinke2	High Tech NE	System (1)	Dec 31, 2018
Henry Smiths Henry.Smiths	High Tech NE	High Tech NE (64)	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	<input checked="" type="checkbox"/>
Rep Name	<input type="text"/>
Rep Full Name	New Service Rep
Initials	<input type="text"/>
EINC	<input type="text"/>
Email	<input type="text"/>
Phone Number	<input type="text"/>
Order Type	Temp
Sales Team ID	Default
Time Zone	<input type="text"/>
Use Daylight Savings	<input checked="" type="checkbox"/>
Web Portal System	<input type="checkbox"/>

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.

The screenshot shows the 'Administration' interface with the 'sec roles' section selected. The left sidebar contains a navigation menu with items like 'interest code', 'message', 'multiplier code', and 'sec roles'. The main content area is divided into two panes. The left pane shows a search bar 'Find a service rep' and a list of 795 active service reps, with 'Administrator' highlighted. The right pane shows a table of security roles.

Sec Role	Description
AC	A/R Clerk
AS	A/R Clerk Cash Posting
AS	A/R Supervisor
AA	ACA General User
AJ	ACA Super User
AE	Account Executive
AR	Accounts receivable
AI	Actions - Import Module
SU	Allow SuperUserMode
AP	AP Bill
A	Applicant Center

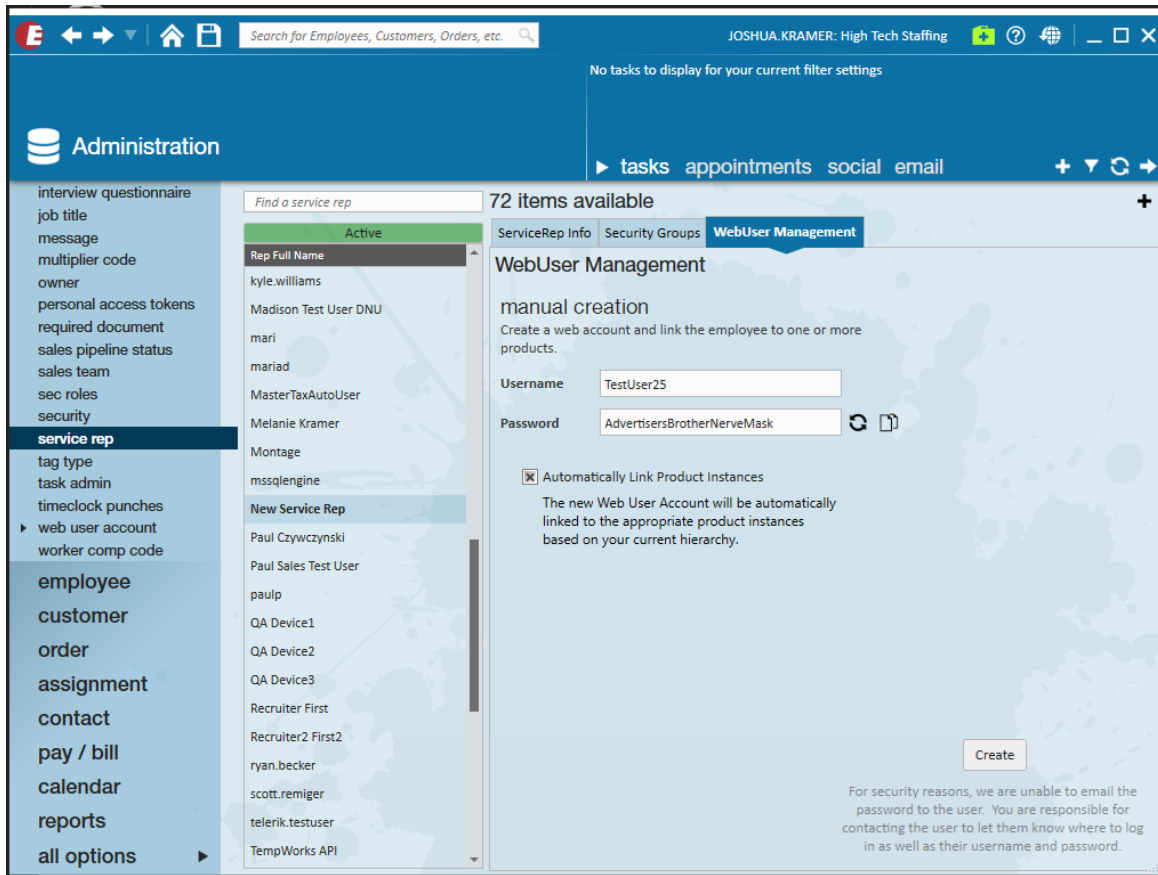
If you copied a user from Bridge, these should be set up for you already. If you created a new user, or needed to update their individual permissions, these can be managed within Enterprise.

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).



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.

Settings / System Settings / Service Representatives

Create and edit service representatives at or below your current hierarchy level. Note: service reps cannot be deleted; only deactivated.

Full Name ↑	Id	Hierarchy Allow...	Status	Teams
A Hill	21801	System	Inactive	
Aaron Jurens	26574	System	Active	
Aaron Moline	21761	High Tech Staffing	Inactive	Admin
Aaron Notestad	21775	High Tech Staffing	Active	DSP Recruiters
aarond	21958	System	Active	
abbasr	21696	System	Inactive	
Abby Brown	25395	System	Active	Team Jason
Abby Gray	26598	System	Active	
Abby Raleigh	26438	System	Active	St Paul Branch Service Reps
Abdi Ahmed	26625	System	Active	
Adam Eckdahl	26706	System	Active	
Adam Helgeson	21924	System	Inactive	
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.

Settings / Permissions

Permission security groups are used to grant service representatives sets of user permissions. Note that service reps may be a member of only one of this type of security group.

Name	Description	System Default ↓	Hierarchy
TempWorks Default - Administrator	Group for Administrators with all necessary permissions.	✓	System
TempWorks Default - Back Office Manager	Managerial group with all applicable back office permissions.	✓	System
TempWorks Default - Billing Clerk	Permission group for standard Billing Clerk role.	✓	System
TempWorks Default - Front Office Manager	Managerial group with all applicable front office permissions.	✓	System
TempWorks Default - Limited Access	Base permission group with very limited functionality.	✓	System
TempWorks Default - Pay Clerk	Permission group for standard Pay Clerk role.	✓	System
TempWorks Default - Sales	Permission group for standard Sales role.	✓	System
TempWorks Default - Staffing Specialist	Permission group for standard Staffing Specialist role.	✓	System
Whippy - Permissions	Default security group to allow Whippy to create contact messages on ...	✓	System
A test	All Permission	✗	System
Admin (limited)	Has admin permissions but limited access to ____	✗	System
A's Administration Permission	All Permission	✗	System
All Permissions	All Permissions	✗	System

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 Beyond.

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 Selecting a parent selects children

Filter...

Global	
Dashboard Page	<input checked="" type="checkbox"/> Access
Employee	<input checked="" type="checkbox"/> Access
Customer	<input checked="" type="checkbox"/> Access
Contact	<input checked="" type="checkbox"/> Access
Job Order	<input checked="" type="checkbox"/> Access
Assignment	<input checked="" type="checkbox"/> Access
Prospect	<input type="checkbox"/> Access
Vendor	<input type="checkbox"/> 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
