

WebCenter v. 5 Quick Start Guide – Employee Portal

This Quick Start Guide was created to assist those Enterprise users who are (1) enabling Employees to access the Employee Portal, as well as assisting those users with basic functions such as; (2) changing the Employee's user name, password, and (3) access level (role).

How to Read this Document

- *Terms listed in **BOLD** are the names of main records or sections (ie. **Employee** or **Visifile**).
- *Terms listed in *Italics* are field names or buttons (ie. *Pay Rate* or *Save*).
- *Terms listed in ***Bold Italics*** are sub-sections in a record (ie. ***Messages*** or ***Contact Methods***)
- *Terms listed in "Quotation Marks" are inputs for the fields or drop down menus (ie. "Available").
- *Information listed in **red** are "best practices" or information about required fields.

1) How to enable an Employee to access the WebCenter Employee Portal

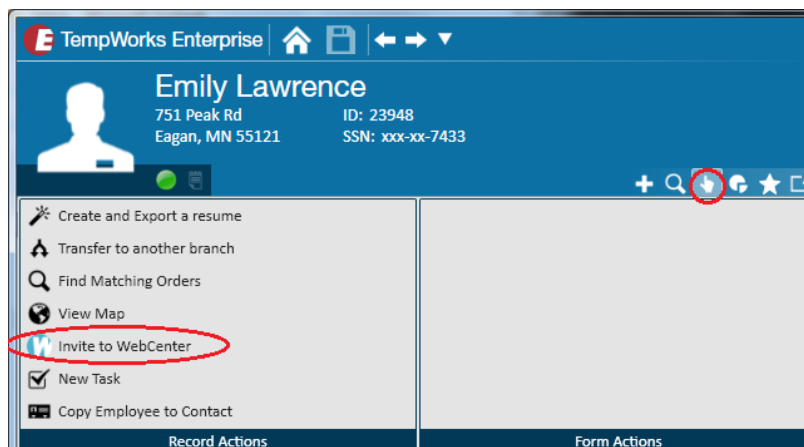
Depending on your Security Role, there may be up to three different ways in which you can enable an Employee to access the WebCenter Employee Portal. First we will cover the process of Inviting users through Enterprise, which will cover the first two ways (A & B), then we will look at how to add an Employee as a user from WebCenter its self (C).

Note: This third option (C) will only be available to those who have the User Search function.

You can enable the Employee to access the WebCenter Employee Portal directly from the **Employee** record in Enterprise two different ways. The first way is inviting them; the second is by manually creating an account. We will cover both of these.

From the **Employee** record select the *actions* button as seen here. 

Clicking on the *actions* button will provide you with the menu of options seen below. Select the option of *Invite to WebCenter*.



Selecting this option will provide you with a pop up box (below) in which you have two options.

A. Invite User to WebCenter: Clicking on this radio button and then selecting *invite* will send an email to the Employee with a link to WebCenter. Once they have clicked on that link they will have the option to create their own user name and password.

B. Manually Create User Account: Clicking on this radio button will allow you to manually create a *user name* and *password* for this Employee's WebCenter login. Once you have entered this information, clicking on *create* will create the account. You will then have to provide this information to the employee so they can log in.

Note: Both option A and B require that you select a role from the *Assign Role* dropdown at the top of the **add webcenter user** form. This role specifies what type of access that employee will have. In other words, what areas of the portal they can see.

C. Enabling an Employee from WebCenter.

Note: This option is only available to those users who have the User Search function in WebCenter.

To enable an Employee as a WebCenter user from WebCenter, after you have logged in, access the *User Search* function on the left hand side (circled below in red).

You can then search for the Employee you wish to provide access to by selecting *Employee* and *WC NonUser* from the two drop downs. You can also use the search fields if you have the Employee's *ID* or *Name*.

ID	Last Name	First Name	Actions
17027	Aasen	Paul	Actions
12323	Beach	Justin	Actions
16632	Blanchard	Mason	Actions

With the search results displayed, on the right side of the line item, click on Actions. This will provide you with the Actions Menu where you should select AddUser.

ID	Last Name	First Name	Actions
17027	Aasen	Paul	<ul style="list-style-type: none"> Actions Menu AddUser
12323	Beach	Justin	Actions
16632	Blanchard	Mason	Actions
16607	Brell	Trick	Actions

Clicking on AddUser will prompt a box on the bottom of the screen, below the search results, as seen below.

Enter in the desired *UserName* and *Password* for the Employee. Once this information has been entered, click on Add User. This will activate the new users access and provide you with a confirmation on the top of your screen.

2) Changing User Names and Passwords

Employee's who have access to the WebCenter Employee Portal do have the capability of retrieving forgotten User Name and Password's on their own (A). It is also possible to change these through Enterprise (B) and for those with WebCenter Admin access, directly from WebCenter (C). We will cover all of these items.

A. Employee's retrieving forgotten information.

From the WebCenter login screen there is the option below the User Name and Password fields to retrieve forgotten information (seen circled in red to the right).

If the Employee selects *User Name*, they will be prompted for their *first name*, *last name*, as well as their *e-mail address*. Once filling in the fields and selecting *Retrieve User Name*, their User Name will be automatically e-mailed to the respective e-mail address.

If the Employee selects *Password*, they will be prompted for their *User Name*. After entering their *User Name* and clicking on *Generate New Password*, a system generated new password automatically be sent to their email address on record in Enterprise.

B. Changing Employee login information within Enterprise

If for some reason the Employee is unable to change their information on their own, or if they have forgotten it and call you, you can access and/or change the login information (both User Name and Password) directly from Enterprise.

To access the Employee's WebCenter login information, open the **Employee** record and click on the *actions* button.

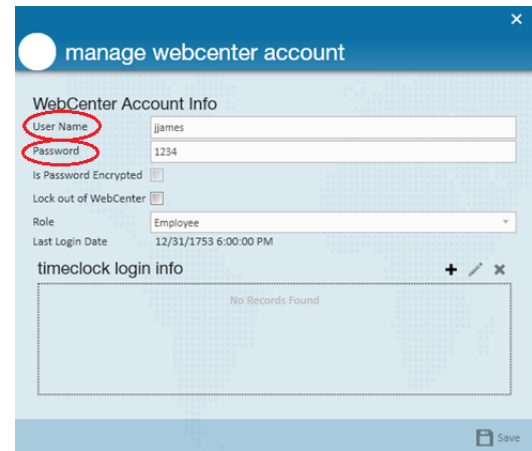


You will then want to select the option of *Manage WebCenter Account* from the actions menu.

Selecting this option will provide you with the screen on the right.

From here you can manually type in a new *User Name* and/or *Password*.

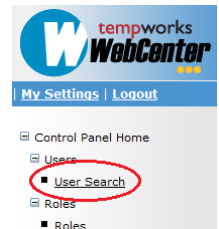
Clicking on *Save* will save the new information.



C. Changing User Names and Passwords from WebCenter.

Note: This option is only available to those who have the *User Search* and *Admin* function in WebCenter.

After logging in to WebCenter you will need to locate the Employee in which you wish to change the information. To do this, select the *User Search* function on the left hand side of your screen.



You will then want to enter in the Employee information in the search fields provided to locate that Employee. Those fields are seen here.

Employee [dropdown] WC User [dropdown] ABCDEFGHIJKLMNOPQRSTUVWXYZ

ID: (AIdent / ContactID) [input] Username: [input] Name: [input] [Search]

Your search results will be displayed below.

Identify the employee line item and click on the Actions button on the right hand side of that line item.

ID	User Name	Last Name	First Name	Role Name	Last Login	Actions
16857	johnadamson	Adamson	John	Employee	11/18/2010 7:03:35 PM	Actions
12382	james	Anders	James	Employee	9/30/2008 2:20:55 PM	Actions
16673	tet	Anthony	Mark	Employee	1/1/1754 12:00:00 AM	Actions
12322	Randy	Applebee	Randy	Employee	9/29/2008 8:57:39 PM	Actions
12326	BOR5744	Borstle	Patty	ReApply	2/3/2009 3:16:01 PM	Actions
16868	Blyss	Brell	Blyss	Employee	12/21/2010 12:56:58 AM	Actions
17123	bbreystone	Breystone	Barbara	Employee	1/1/1754 12:00:00 AM	Actions
12324	CLA0224	Classen	Sandra	Employee	2/3/2009 3:44:14 PM	Actions
16552	rgrandville	Grandville	Robert	Employee	1/1/1754 12:00:00 AM	Actions

This will provide you with an Actions menu and from here you can select either Change Password or Change User Name. Both will provide you with a box on the bottom of your screen where you can enter in a new password or user name.

Change User Name For: James, Bailey

Current User Name: ejames

New User Name: bailey

Confirm New User Name: bailey

[Change User Name]

Change Password For: James, Bailey

New Password: [input]

Confirm New Password: [input]

[Change Password]

3) Changing an Employee's Role (access level)

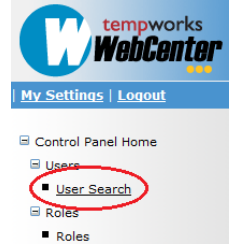
If you have separate roles set up for various user levels this can be managed and changed from directly within WebCenter (A) or from Enterprise (B).

Note: Only those users with role configuration have the ability to create various user roles.

Note: Only those users with Administration access have the ability to change an Employee's role within WebCenter.

A. Changing an Employee role within WebCenter.

Once you have logged in to WebCenter, select the *User Search* function (seen to the right) to search for the Employee for whom you wish to change the role. Enter the Employee information in the fields seen below to find the Employee.



Employee: [dropdown] WC User: [dropdown] ABCDEFGHIJKLMNOPQRSTUVWXYZ

ID: (AIdent / ContactID) [input] Username: [input] Name: [input] [Search]

Your search results will be displayed. Identify the employee and click on the Actions button on the right side of the Employee's line item as seen here.

ID	User Name	Last Name	First Name	Role Name	Last Login	Actions
16857	johnadamson	Adamson	John	Employee	11/18/2010 7:03:35 PM	Actions
12382	james	Anders	James	Employee	9/30/2008 2:20:55 PM	Actions
16673	tet	Anthony	Mark	Employee	1/1/1754 12:00:00 AM	Actions
12322	Randy	Applebee	Randy	Employee	9/29/2008 8:57:39 PM	Actions
12326	BOR5744	Borstle	Patty	ReApply	2/3/2009 3:16:01 PM	Actions
16868	Blyss	Brell	Blyss	Employee	12/21/2010 12:56:58 AM	Actions
17123	bbreystone	Breystone	Barbara	Employee	1/1/1754 12:00:00 AM	Actions
12324	CLA0224	Classen	Sandra	Employee	2/3/2009 3:44:14 PM	Actions
16552	rgrandville	Grandville	Robert	Employee	1/1/1754 12:00:00 AM	Actions

To change an Employee's role, from the Actions Menu, select Edit Role. This will provide you with a box on the bottom of your search results that looks similar to what is seen below.

Edit Role For: Breystone, Barbara

Cancel [dropdown] Change Role

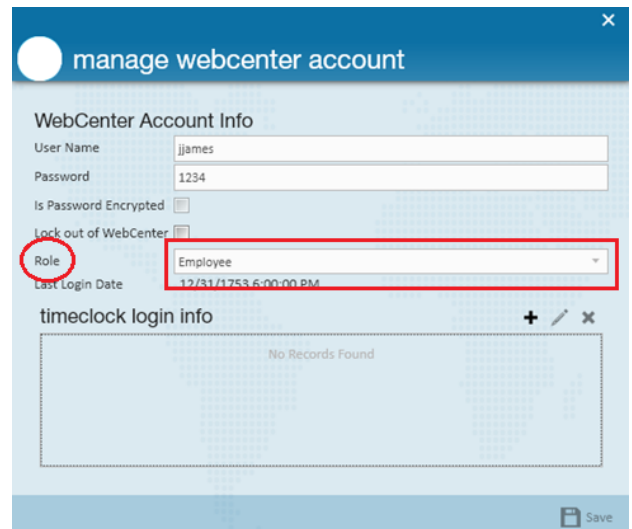
From this area you can click on the dropdown and select the role in which you want the Employee set to. After you have selected your option from the dropdown, clicking on Change Role will set their access level to this new role.

B. Changing an Employee role from within Enterprise.

Enterprise users can change the Employee role from directly within the employee record in Enterprise. To do this, from the employee record, click on the *Actions* button.

This will provide you with the Actions Menu and from here select *Manage WebCenter Account*. Clicking on this will display the screen to the right.

From here, use the *Role* dropdown to select the *Role* in which you wish to have the employee set as. Once selected, click on *Save* on the bottom right of this box to change the role.



Still Have Questions?

For more information about the WebCenter Employee portal please reference additional training documents on our website.

For specific questions you may also contact customer support at 651.452.0366 or by sending an email to support@tempworks.com.

To schedule training on WebCenter, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact the training department at trainers@tempworks.com.