TempWorks WebCenter *fx* Administrator Manual

Introduction

TempWorks has been providing solutions designed for the staffing industry since 1994. Our customer base consists entirely of staffing companies. Therefore we take great care to ensure that our software reflects the development requests of those staffing companies, thus allowing our customers to stay ahead of their competition and on top of the challenges of today's market.

WebCenter *fx*, a complete ground-up rebuild that replaces the old WebCenter product, was designed using entirely new technology and features the integration of the TempWorks Applicant Portal and Job Board, Notifications Services, an exciting new interface and an extreme depth of functionality. Recent Microsoft® technologies were used to create the new WebCenter *fx*. .Net 2.0 served as the platform to rewrite the application's modules, making it possible to deliver high-demand features. Windows Workflow was woven in to drive the timecard approval process, directing the process from start to finish without the need for manual/human interaction. The new Notification Services enables WebCenter *fx* to deploy messages via several delivery methods including Email, text messaging, SMS messaging and potentially, through a speech server to make phone calls. Through their accounts, users can set which types of notifications to receive and their preferred delivery method.

Also unique to the new version of WebCenter is SQL Reporting Services, which replaced the previous Crystal Reports. Chosen for its simplicity, the new reporting engine intuitively creates and schedules reports run from the core TempWorks database.

The new WebCenter *fx* offers several enhancements to all modules of the application. Noteworthy in the Employee Portal is the ability to view and print current and previous year's W2's and pay check details. Users of both the Customer and Employee Portals now benefit from the new web timecard system, which presents amplified customization options, new features and a user-interface promoting easier navigation and reduced error probability.

The components of WebCenter *fx* are designed to drive client and employee retention while streamlining recruitment processes and increasing staff efficiency. The Customer Portal offers a staffing firm's clients greater control over their procurement process and opens access to information crucial to decision making. With the Employee Portal, the doors of communication are unlocked and employees gain a sense of value and independence. The Applicant Portal and Job Board make it simple for candidates to search and apply for open jobs online, right from a company's website.

*Note – Each Staffing Company can customize WebCenter *fx* as they choose. This documentation is written and displays screen shots pertaining to the out-of-the-box WebCenter solution. Any customizations created for your company will not be included in this documentation.

How to Read this Manual

*Terms listed in **BOLD** are the names of main pages or sections of the website (ie. **Home** page).
*Terms listed in *Italics* are field names, buttons or tabs within a webpage (ie. *History* tab).
*Terms listed in <u>*Underlined Italics*</u> are links to other pages within the website (<u>*forgot password?*</u> link).
*Terms that are <u>Underlined</u> are sub-sections of the webpage (ie. <u>Contact Information</u>).
*Terms listed in "Quotation Marks" are inputs for the fields or drop down menus (ie. "Vacation").

Administrator – Login Page

When an administrator first opens the WebCenter they will see the **Login** page as shown below:

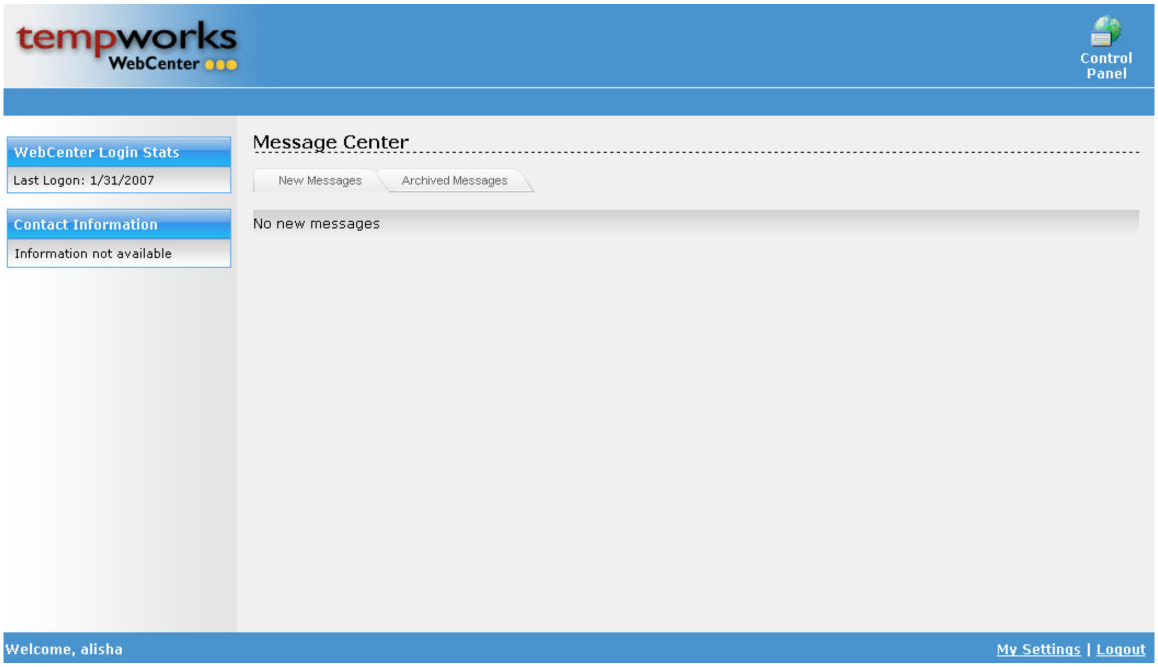
This **Login** page is where they should enter their *User Name* and *Password* to sign into WebCenter *fx*. If this user will be accessing the WebCenter from a computer that only they will use they can click in the *Remember me next time* check box to leave a check mark. When this is selected the user will automatically be brought to their WebCenter *fx* **Home** page the next time they select the WebCenter link.

After the administrator has entered their *User Name* and *Password* they can click on the *sign in* button (as circled). This will navigate the user to their **Home** page.

If the user cannot remember their password they can click on the *Forgot Password?* link to navigate to the view to the left. After they enter their *User Name* they can click on *Generate New Password* to have a new password created.

Administrator – Home Page

Once the administrator has logged in they will be brought directly to their **Home** page. The **Home** page displays the last time the user logged in and gives them access to the administrator **Control Panel**.



On the left side of the screen the administrator can view their *Last Logon* date in the WebCenter Login Stats.

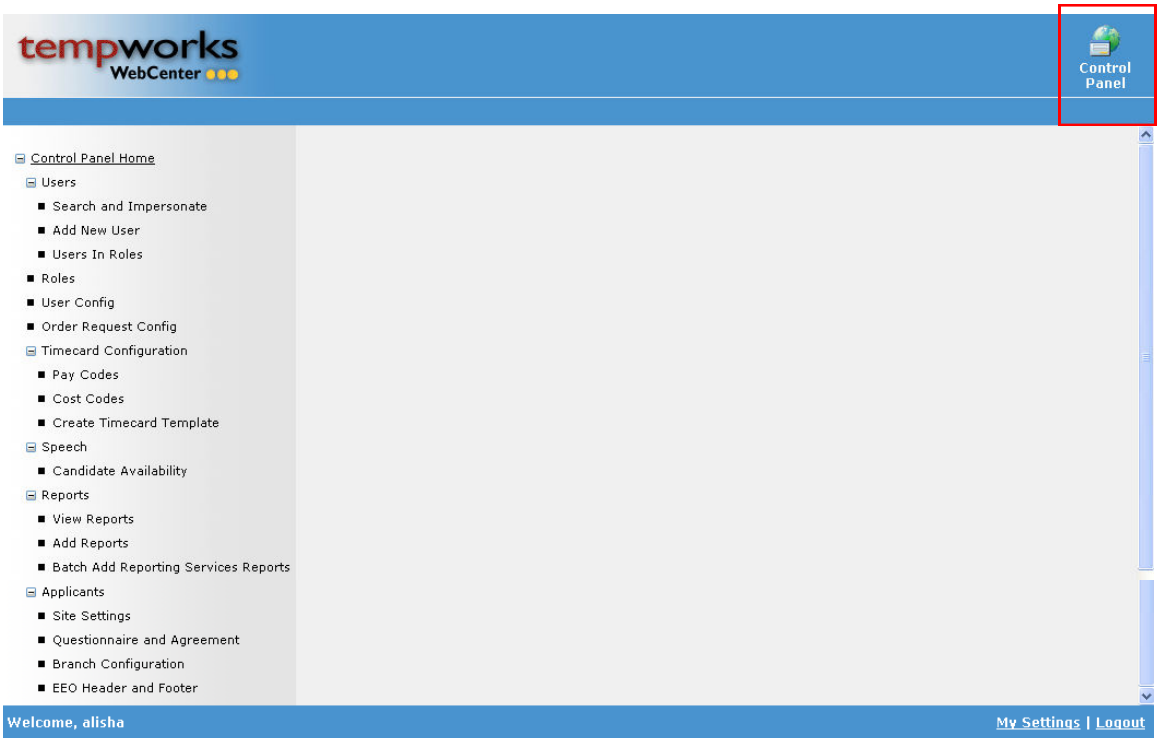
The lower left side of the screen displays the user who is currently logged in. The message will read "Welcome, *User Name*" (In this instance "alisha" is displayed).

*Note – If the contact's name is not displayed next to the "Welcome" text, then they should click on the *Logout* link on the lower right to log out the current user which also navigates them back to the WebCenter *fx* log in page where they can enter their *User Name* and *Password*.

*Note to Tempworks users – At this point administrator messaging is currently under development. More information will be available on this feature as this project is completed.

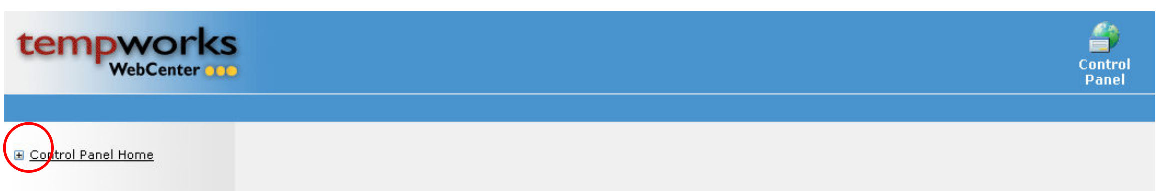
Administrator – Control Panel

To enter the **Control Panel** page in WebCenter *fx* the customer contact should click on the **Control Panel** link in the upper right of the screen. The page below will be displayed. On this page the user can access all of the administrator functions available for the different applications within WebCenter *fx*.



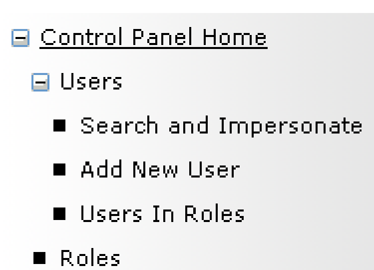
On the left side of the screen is the *Control Panel Home* link that allows the user to access different functions and format forms in the Employee and Customer portal as well as the Online Application and Online Job Board.

Click on the "-" to minimize the functionality list on any of the different sections of the **Control Panel** view (as shown below).



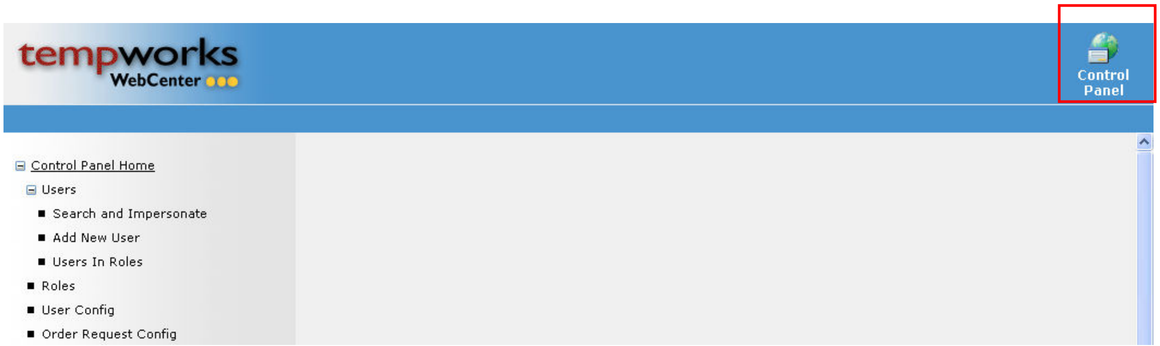
Once expanded, the *Control Panel Home* link will list out all of the administrator functions on the left side of the screen. Any of the main headers can be expanded or minimized by clicking on the "+" or "-" key in front of the line.

An example of this would be the minimized view of the *Users* function to the left and the expanded version of the same function to the right.



Administrator – Users

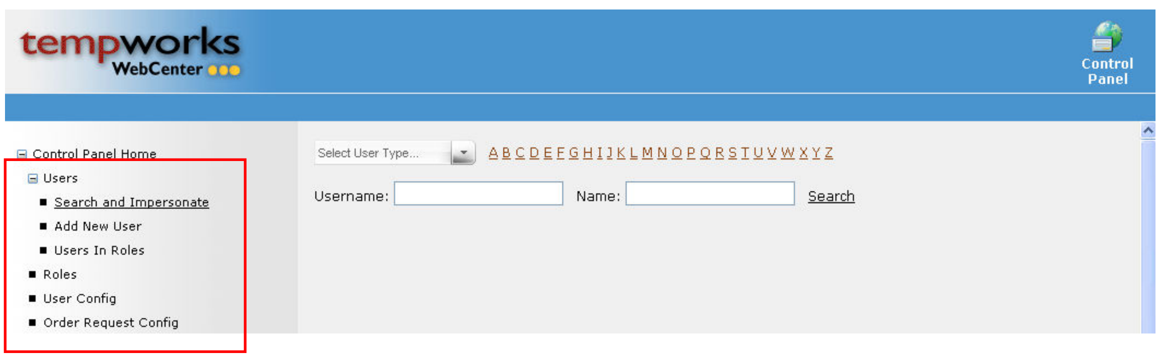
There are many features within the *Users* function including: impersonating other users, adding users and assigning (or creating) roles for the employees and customer contacts utilizing the WebCenter *fx* product.



To access the *Users* function click first on the **Control Panel** in the upper right (from the administrator **Home** page) and if the view above is not displayed, click on the "+" in front of the *Users* line to expand the list.

Search and Impersonate

The *Search and Impersonate* functionality allows an administrator user to find a contact or employee user and then view the screen as if they were logging in as that employee or customer contact.

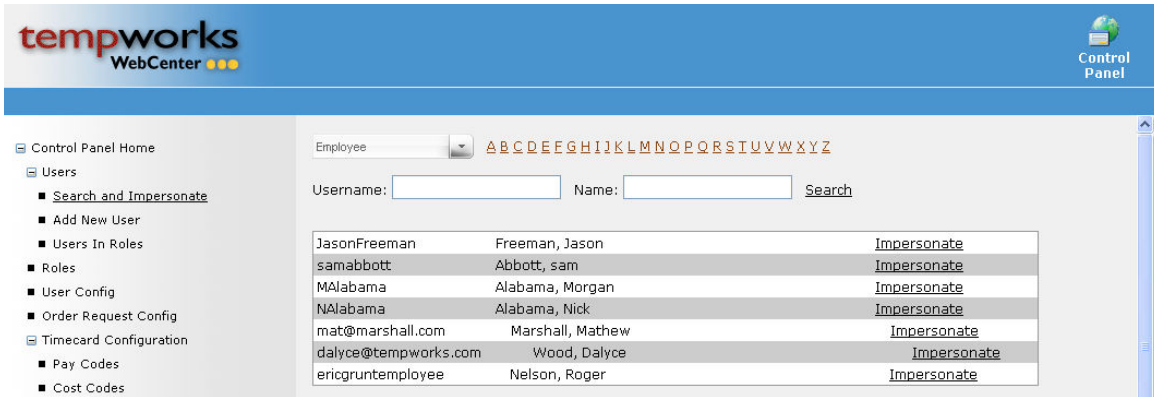


When the *Search and Impersonate* link is selected the view above will be displayed. From the *Select User Type* drop down menu the administrator can select "Employee", "Customer Contact", "Applicant", etc. and then use the *Letters*, *Username*, or *Name* look up fields to find the person who should be impersonated.

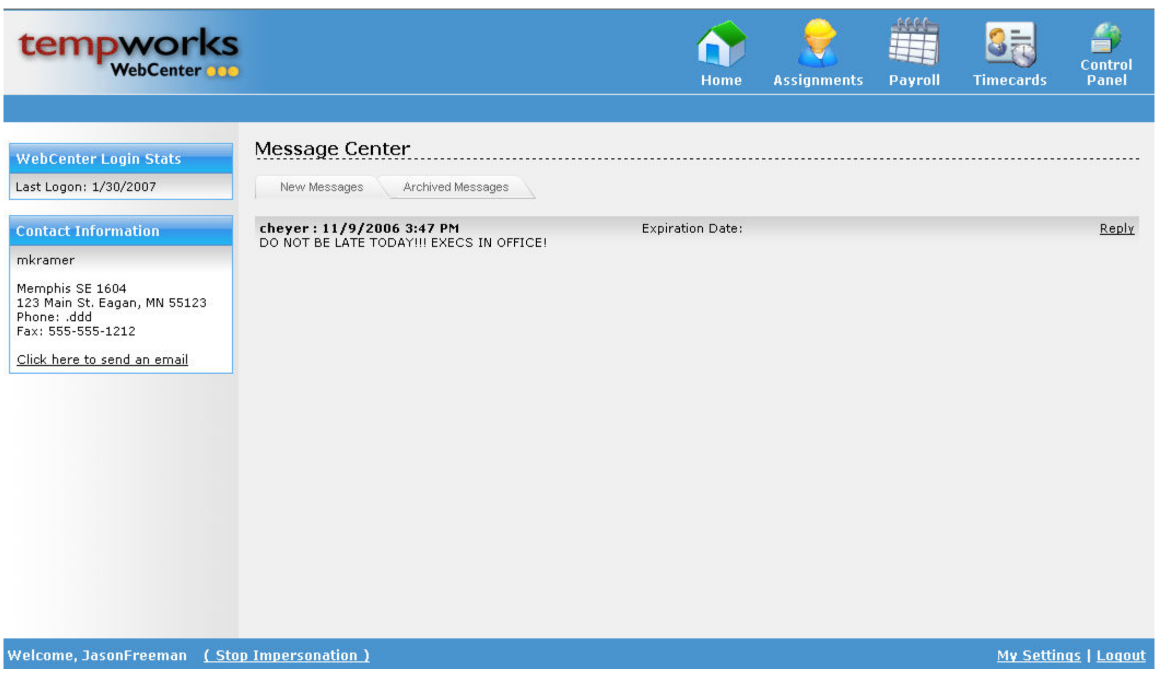
To use the *Letters* look up, select the type of user from the menu and then click on the letter that corresponds with the first letter of the user's Last Name. This will return a list of all users of the selected type with a last name beginning with the letter chosen (ie. "*F*" for "Freeman, Jason).

To use the *Username* or *Name* look up fields enter the corresponding information and then click on the *Search* link to return the list of users that match the criteria chosen.

*Note – Leaving the *Username* and *Name* fields blank will return all users of the specified type when the *Search* link is clicked (as shown in the example below).



To select the person to be impersonated, click on the *Impersonate* link on the same line as the name of the user. Once a user is selected WebCenter *fx* will display the screen as if the administrator were logging in as the chosen user.



The above screen is a view of employee user, Jason Freeman's WebCenter **Home** page. The only differences that an administrator will see that Jason would not, are the **Control Panel** link in the upper right ant the *Stop Impersonation* link in the lower left after the individual's *Username*. The administrator can now view **Assignments**, print a W-2 form, view or create **Timecards** or any other user function available to the employee.

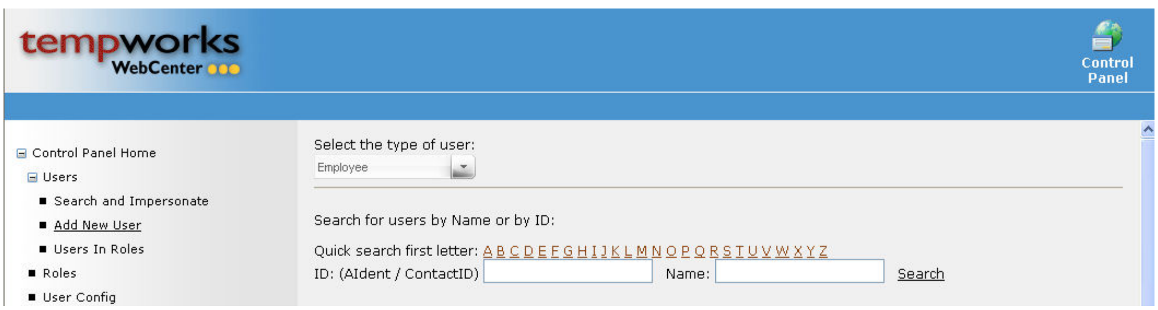
*Note – For more information about the Employee and Customer Portal features please refer to the corresponding manuals.

When an administrator is done impersonating a user they merely need to click on the *Stop Impersonation* link in the lower left of the screen. This will return the administrator to their **Home** page where the **Control Panel** can be opened by clicking on the button in the upper right.

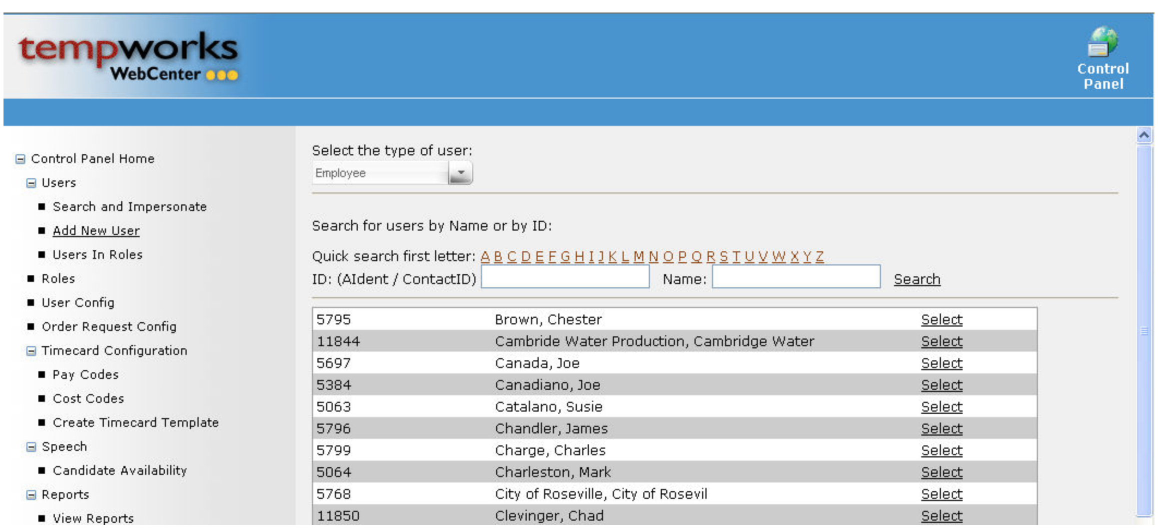
Add New User

The *Add New User* functionality allows an administrator user to locate records in the core Tempworks product and add them as users to the WebCenter.

The administrator will first choose the type of user (ie "Employee" or "Customer Contact") from the *Select User Type* drop down menu as shown in the view above. The view below displays the way that the users can be found.

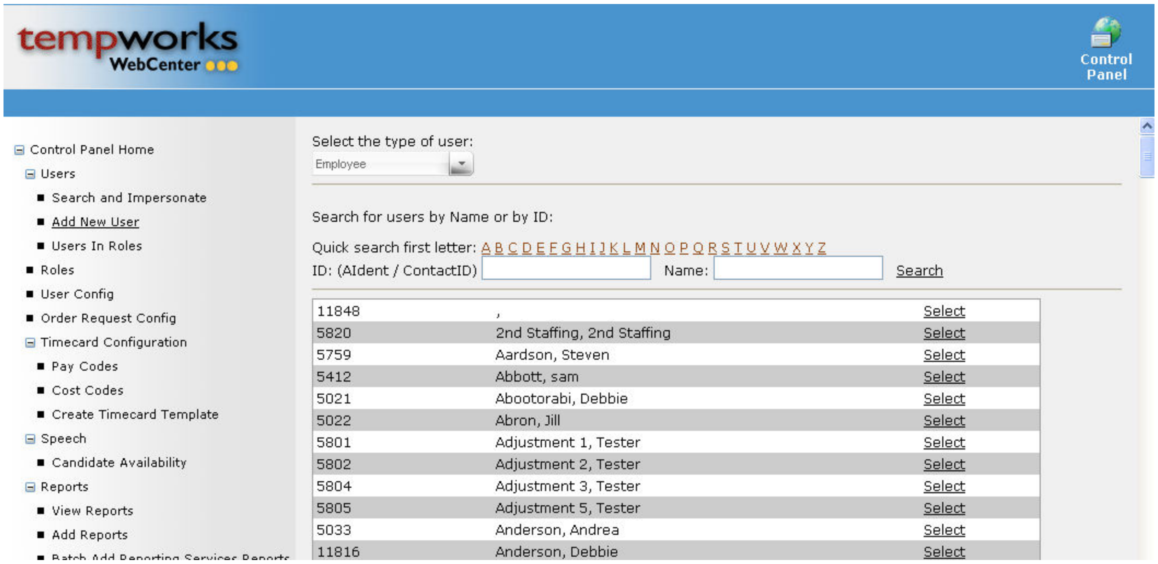


To use the *Letters* look up, select the type of user from the drop down menu and then click on the letter that corresponds with the first letter of the user's name. This will return a list of all users of the selected type with a last name (or first name) beginning with the letter chosen (ie. "*C*" for "Canada, Joe" or "Brown, Chester").

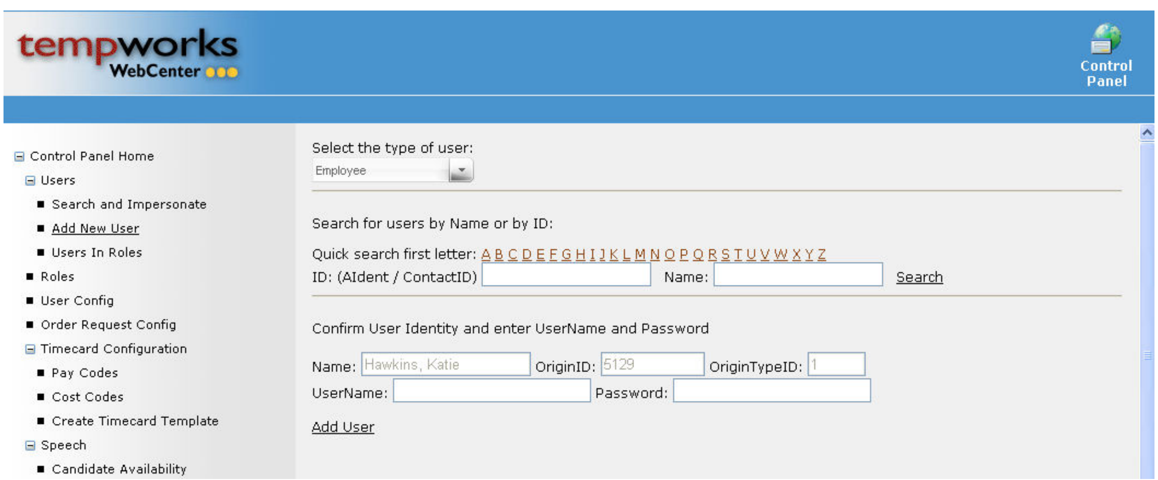


The administrator can also look up records by entering their *ID: (Aident/ContactID)* or *Name* and then clicking on the Search link to return a list of individuals that match the criteria entered.

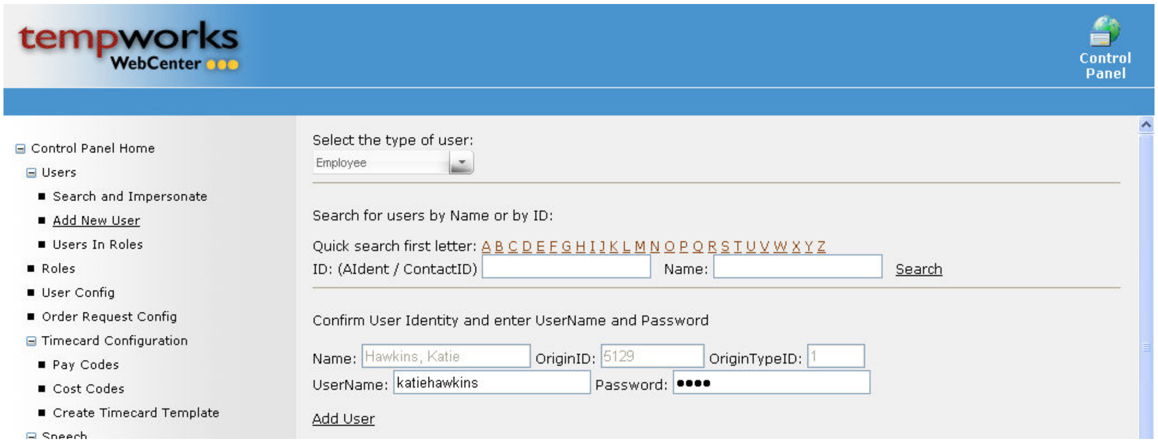
*Note – Leaving the *ID: (Aident/ContactID)* and *Name* fields blank will return all users of the specified type when the Search link is clicked (as shown in the example below).



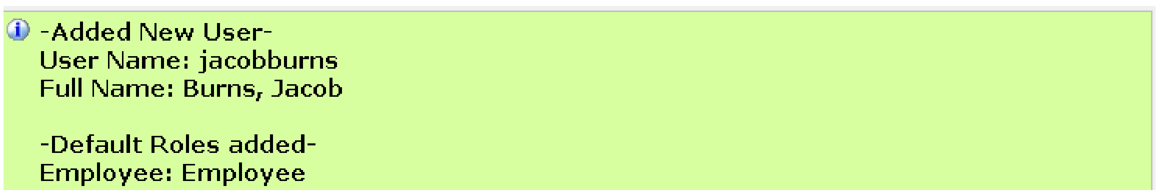
An administrator can select an individual from the list by clicking on the Select link for the corresponding line.



The *Name*, *OriginID*, and *OriginTypeID* will automatically be populated with the information from the chosen record. The administrator will then create a *Username* and *Password* for the person and click on the *Add User* link to create the new user as displayed below.

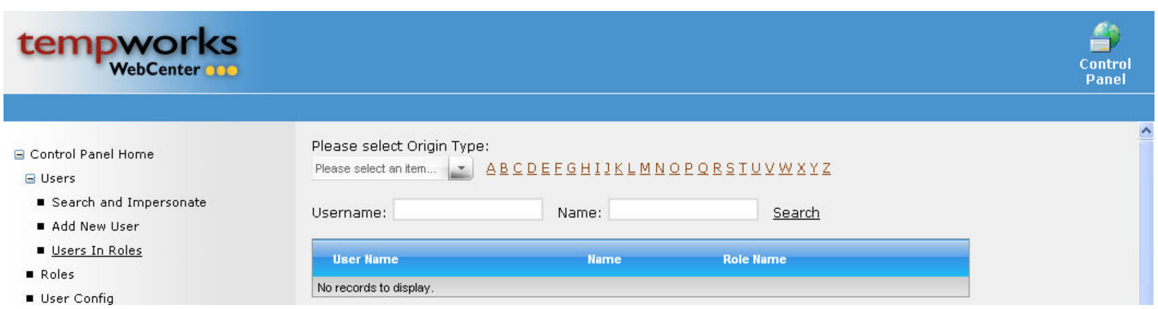


Once a user has been added to the WebCenter a verification message will be displayed in green that the user was successfully added and will also list the type of user that was added as seen in the view below.



Users in Roles

The *Users in Roles* functionality allows an administrator to edit the default role for a user. Configuring *Roles* will be covered in the next section, but this section will cover how to assign an individual WebCenter user to a specific role.

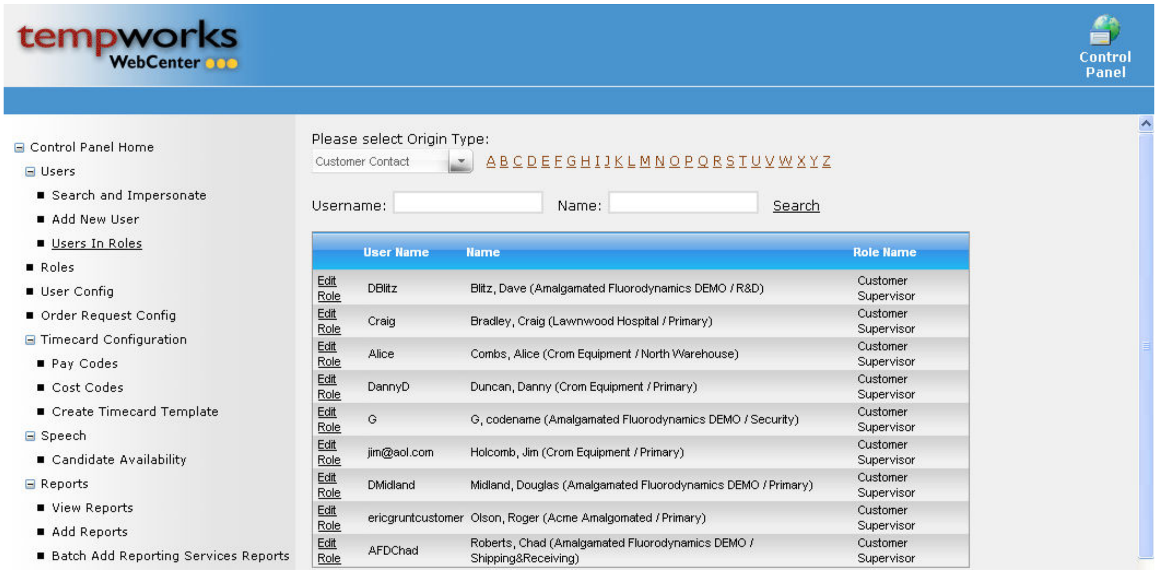


The original type of role should be selected from the *Please select an item* drop down menu (ie. "Applicant", "Employee", etc.) Once the type is chosen the administrator can use the look up features to find the record.

To use the *Letters* look up, select the type of record origin from the drop down menu and then click on the letter that corresponds with the first letter of the user's name. This will return a list of all users of the selected type with a last name (or first name) beginning with the letter chosen (ie. "*C*" for "Canada, Joe" or "Brown, Chester").

To use the *Username* or *Name* look up fields enter the corresponding information and then click on the *Search* link to return the list of users that match the criteria chosen.

*Note – Leaving the *Username* and *Name* fields blank will return all users of the specified type when the *Search* link is clicked (as shown in the example below).



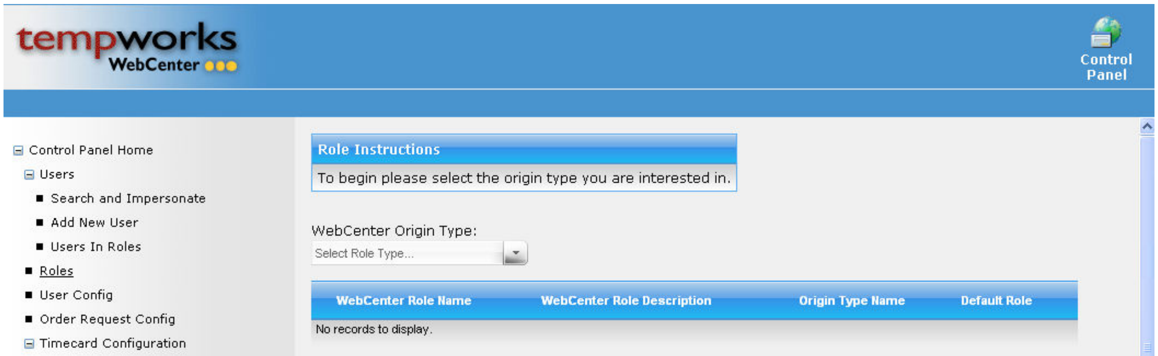
The administrator will then choose the record where the role should be changed by clicking on the *Edit Role* link on the line of the corresponding record.

Once a user is selected the administrator can choose a role from the drop down menu (ie. "Clerk", "Cust Hiring Mgr", "Customer Supervisor" etc.). To change the role the administrator will click on the *Change Role* link as circled.

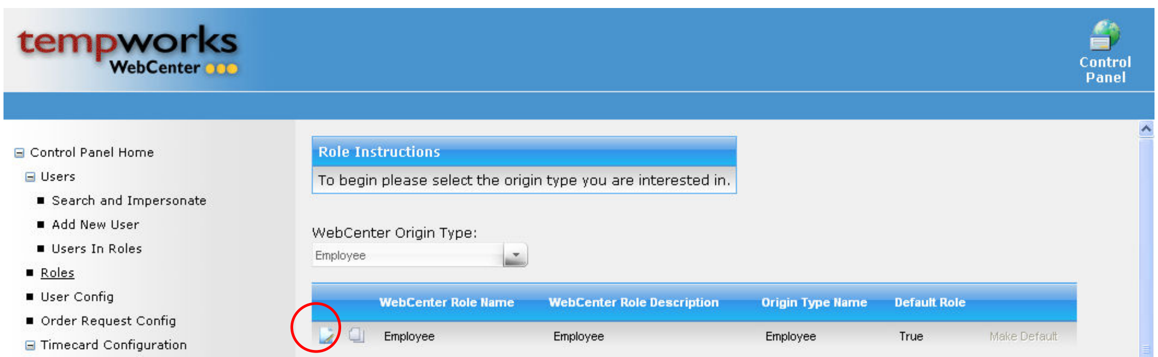
Once the role has been changed a notification will be listed at the top of the screen in green as shown:

Roles

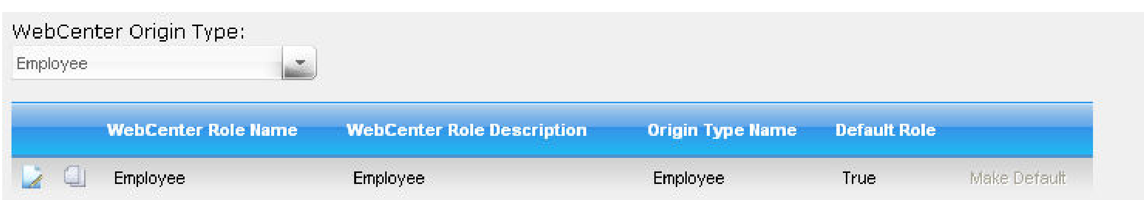
The *Roles* functionality allows an administrator to edit the types of roles and what the users assigned to that role can view in WebCenter. To edit roles click on the *Roles* link on the left side of the screen.

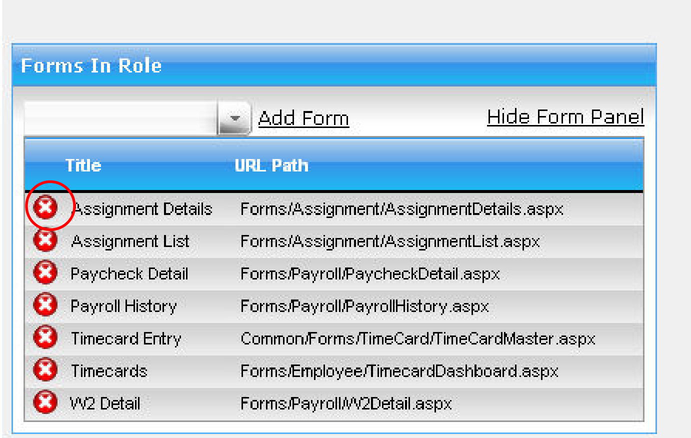


First, select the original type of role from the *Select Role Type* drop down menu. Next, all of the roles with that origin type will be displayed as in the view below.



To view the role configuration click on the *Paper and Pencil* icon to the left of the role as circled above. When the icon is clicked the following view will be shown.

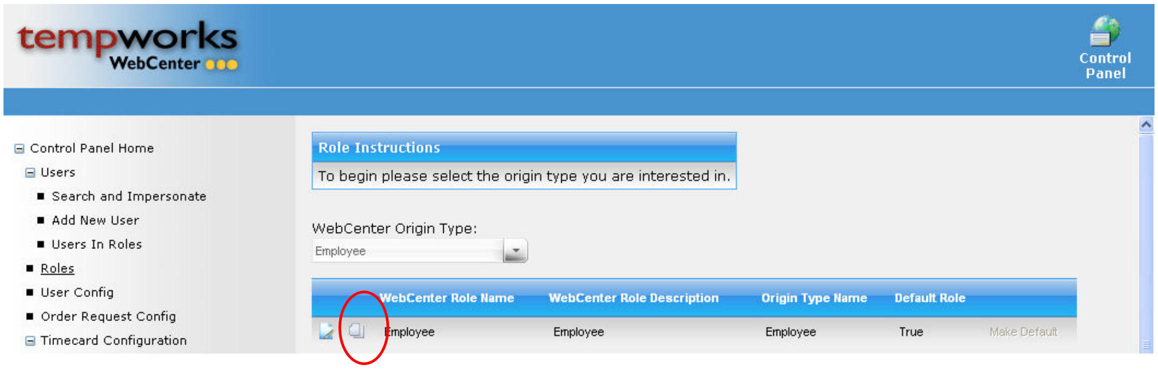




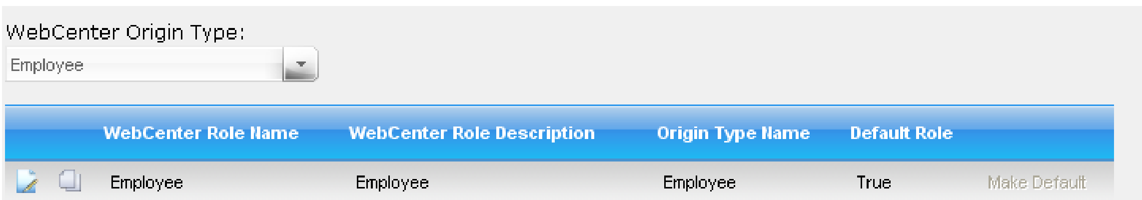
To hide a form from the user type selected click on the *X in a Circle* icon as shown to the left. By clicking on this icon the form on the corresponding line will not be viewable to users of the selected type.

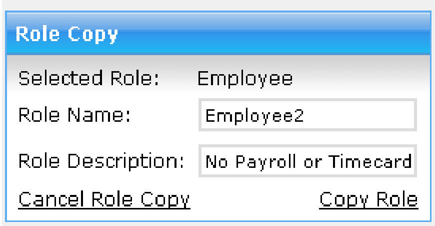
To add a form to the selected user type, choose the form from the drop down menu next to the *Add Form* link. Once a form is selected, click on the *Add Form* link to include the form for the selected user type.

To hide the form panel and return to the view shown previously click on the *Hide Form Panel* link.



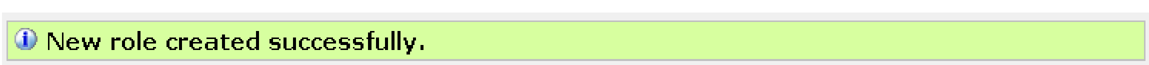
To add a new type of role that can be assigned to users click on the *Layered paper* icon as circled above. This will create a copy of the selected role and then a new role name can be selected as well as selecting forms that users in that role can view.



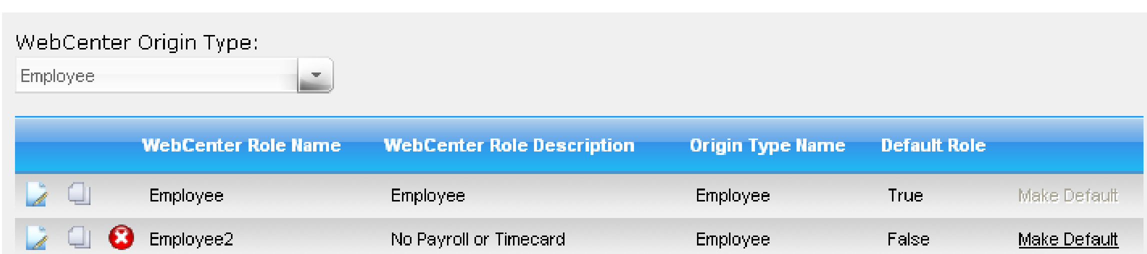


Once the role has been copied the *Role Name* and *Role Description* should be entered in the appropriate fields. After this information is entered the administrator should click on the *Copy Role* link to create the new role type.
If the role type should not be created, click on the *Cancel Role Copy* link to return to the previous view.

Once a role has been created the following prompt will be displayed on the screen.



The new role will be displayed in the list. The administrator can choose to set this role as the default for new users of the selected type by clicking on the *Make Default* link on the right side of the line.

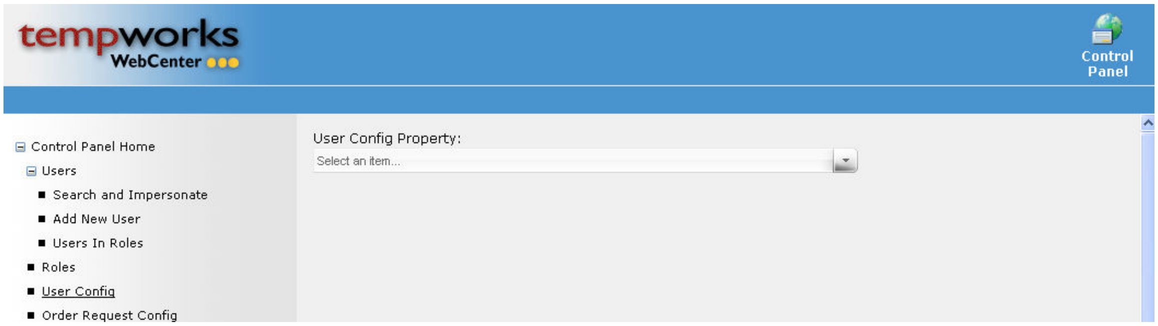


To delete the role click on the *X in a Circle* icon to the left of the role name. To edit the new role follow the steps earlier in this section for adding or deleting forms.

*Note – If a role is deleted, any users assigned to that role will automatically be returned to the default role for their user type.

User Config

The *User Config* functionality allows an administrator to edit the pages that users are able to view in the WebCenter. To access the configuration functionality the administrator will click on the *User Config* link on the left of the screen.



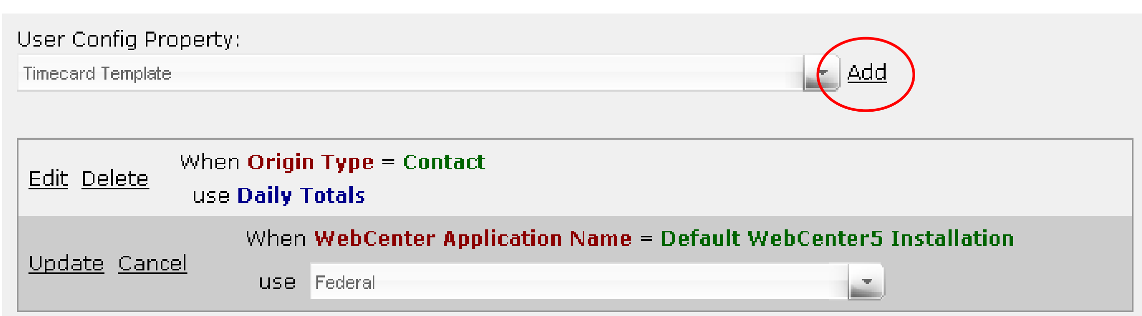
To configure a property select it from the *Select an item* drop down menu. The next views will cover the seventeen user configurations that can be completed by an administrator at the time of this manual's creation.

*Note - As other user configuration forms are completed they will be added to the WebCenter *fx* administrator manual.

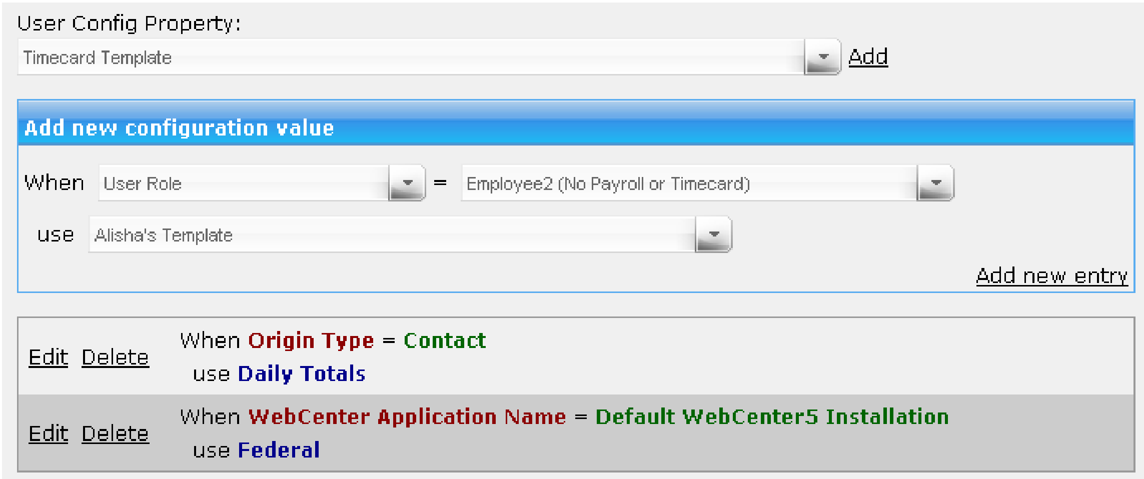
Timecard Template

The Timecard Template allows the administrator to select what type of timecard the selected user type will be able to view.

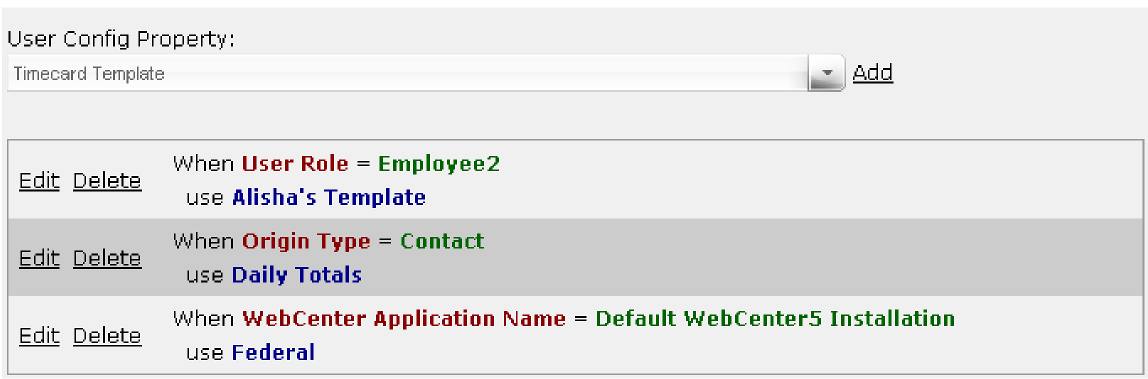
Clicking on the *Edit* link will allow the administrator to change the current setting by choosing a new type of timecard from the drop down menu.



Once the new timecard has been selected, click on the *Update* link to change the configuration or click on the *Cancel* link to cancel the change. To create a new configuration click on the *Add* link as circled above.



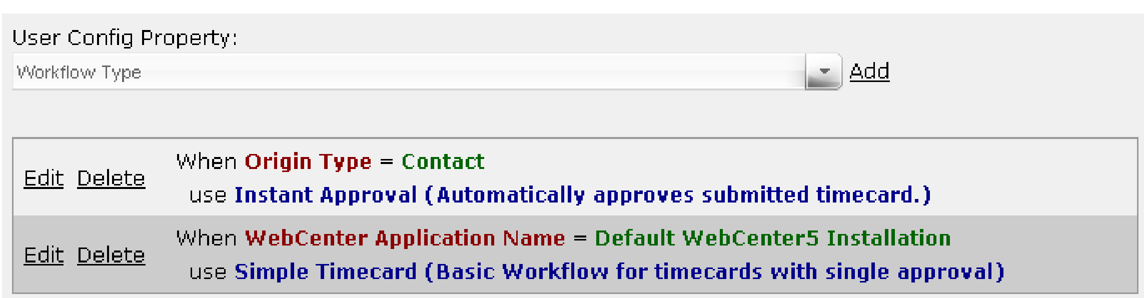
To configure the new information use the drop down menu in the upper left to select the type of role. Once this is selected the 2nd drop down menu will be automatically populated with records matching the role type selected. The last drop down menu is where the timecard for the selected role (or individual) should be selected. Once all fields have been populated, click on the *Add new entry* link to create the new configuration.



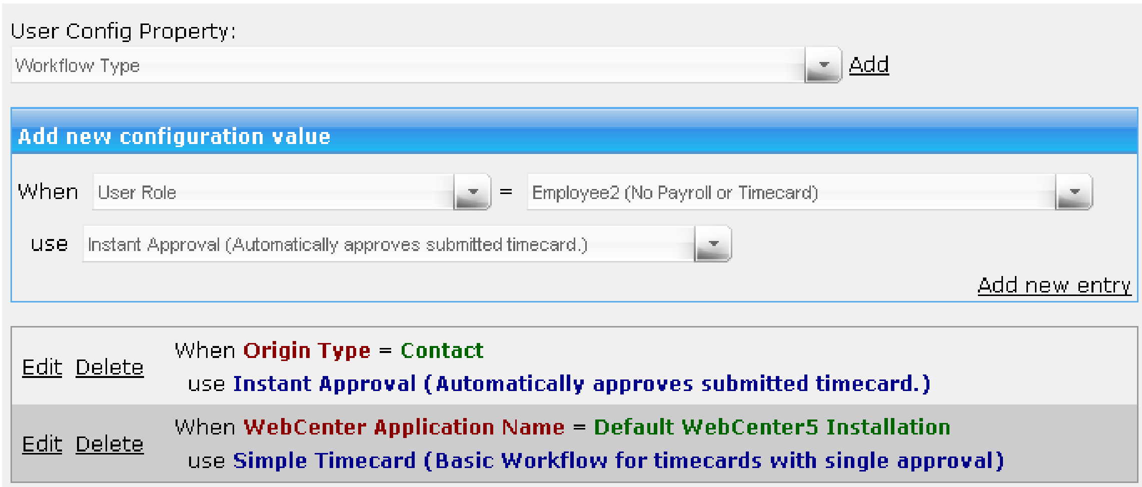
To delete a timecard configuration from the list, click on the *Delete* link on the left of the corresponding line.

Workflow Type

The Workflow Type allows the administrator to select what kind of approval process is involved in the timecard workflow.



*Note – The steps for editing and deleting in the Workflow Type configuration are the same as in the Timecard Template. The administrator should use the drop down menu provided to change the configuration.

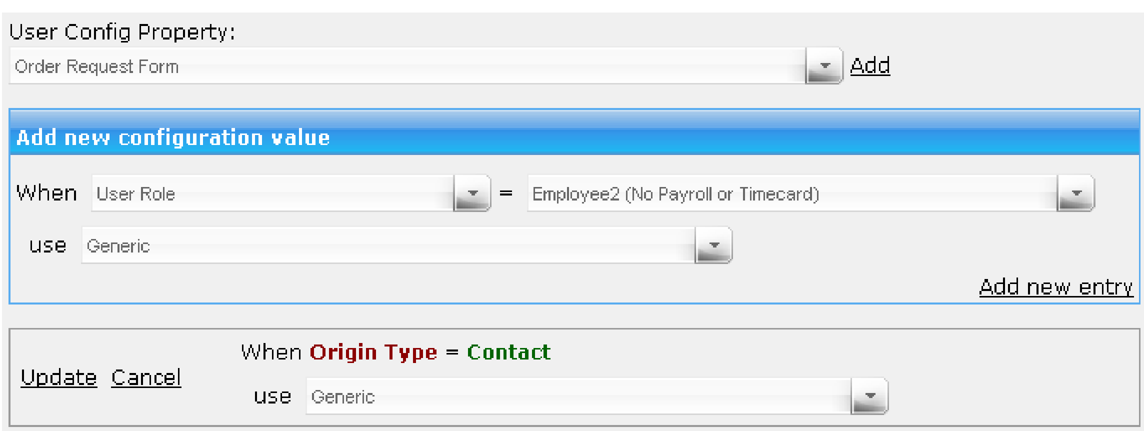


*Note – The steps for adding a new Workflow Type configuration are the same as in the Timecard Template. The administrator should use the drop down menus provided to change the configuration.

Order Request Form

The Order Request Form configuration allows the administrator to choose the type of order request form that the selected user type or individual is able to view in WebCenter. The types of orders are created in the *Order Request Config* which will be explained in the next section.

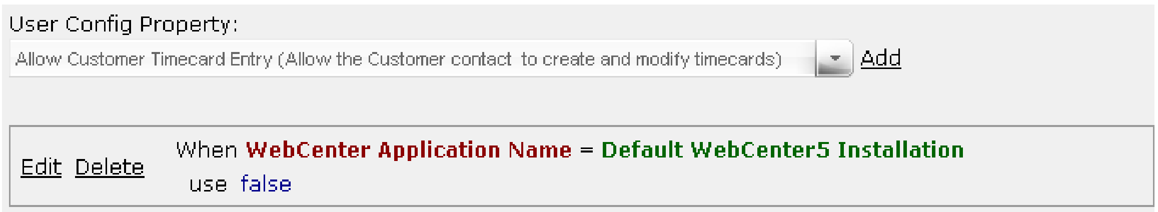
*Note – The steps for editing and deleting in the Order Request Form configuration are the same as in the Timecard Template. The administrator should use the drop down menu provided to change the configuration.



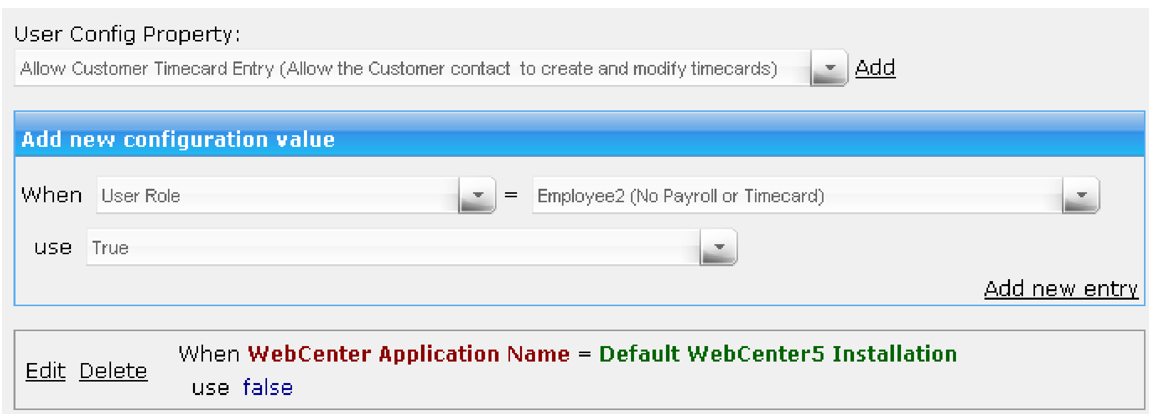
*Note – The steps for adding a new Order Request Form configuration are the same as in the Timecard Template. The administrator should use the drop down menus provided to change the configuration.

Allow Customer Timecard Entry

The Allow Customer Timecard Entry configuration allows the administrator to choose if a customer contact can create or modify timecards.



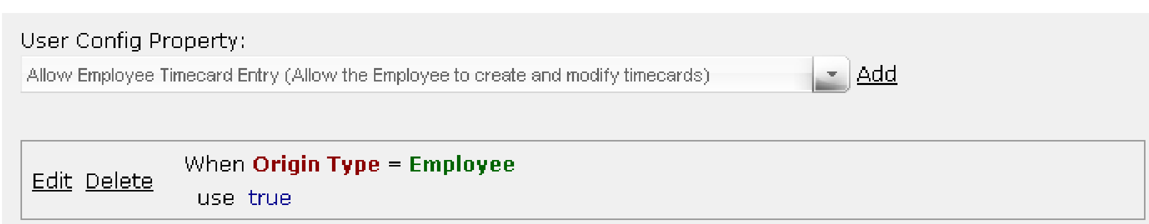
*Note – The steps for editing and deleting in the Allow Customer Timecard Entry configuration are the same as in the Timecard Template. The administrator should use the drop down menu provided to change the configuration.



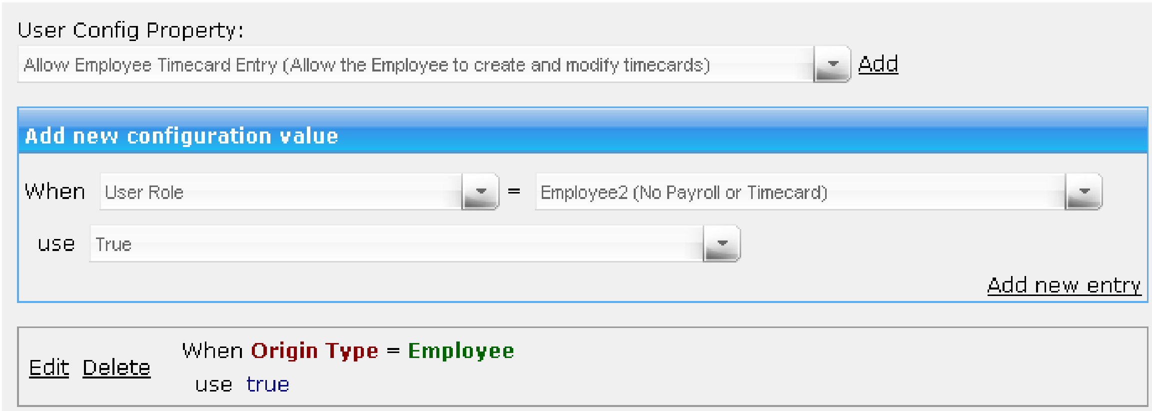
*Note – The steps for adding a new Allow Customer Timecard Entry configuration are the same as in the Timecard Template. The administrator should use the drop down menus provided to change the configuration.

Allow Employee Timecard Entry

The Allow Employee Timecard Entry configuration allows the administrator to choose if an employee can create or modify timecards.



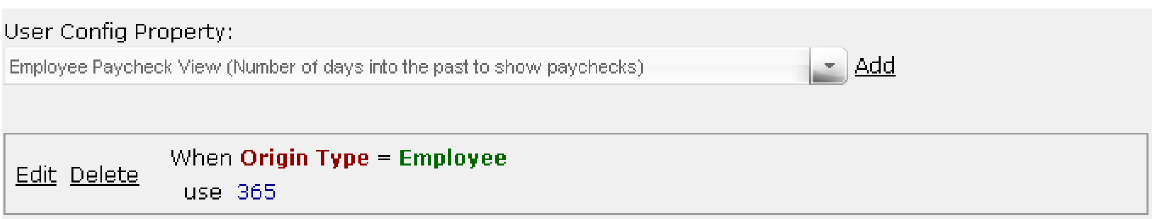
*Note – The steps for editing and deleting in the Allow Employee Timecard Entry configuration are the same as in the Timecard Template. The administrator should use the drop down menu provided to change the configuration.



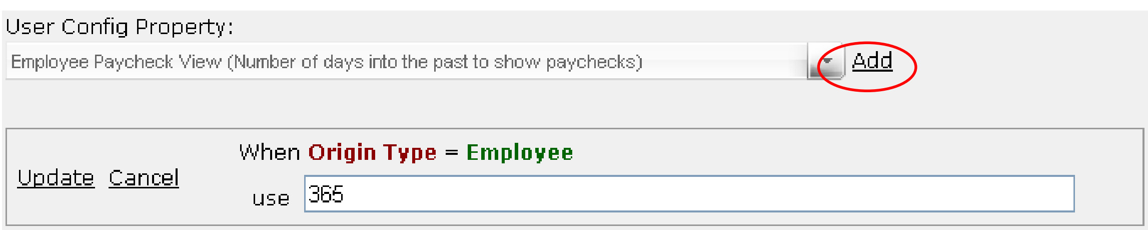
*Note – The steps for adding a new Allow Employee Timecard Entry configuration are the same as in the Timecard Template. The administrator should use the drop down menus provided to change the configuration.

Employee Paycheck View

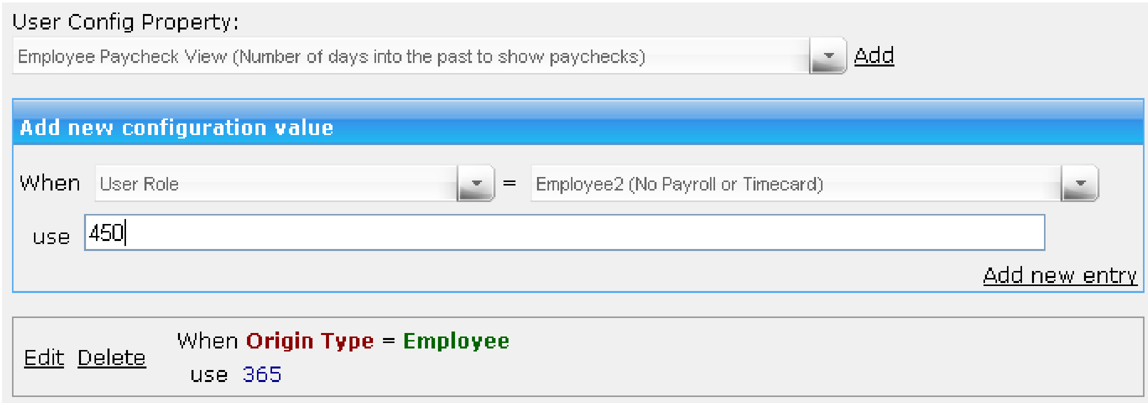
The Employee Paycheck View configuration allows the administrator to choose how many days into the past the employee can view their paycheck history.



Clicking on the *Edit* link will allow the administrator to change the current setting by manually entering the number of days into the past that the employee can view their paychecks.



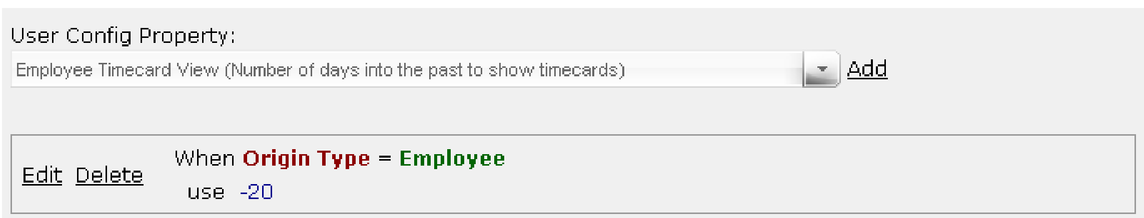
Once the number of days has been entered, click on the *Update* link to change the configuration or click on the *Cancel* link to cancel the change. To create a new configuration click on the *Add* link as circled above.



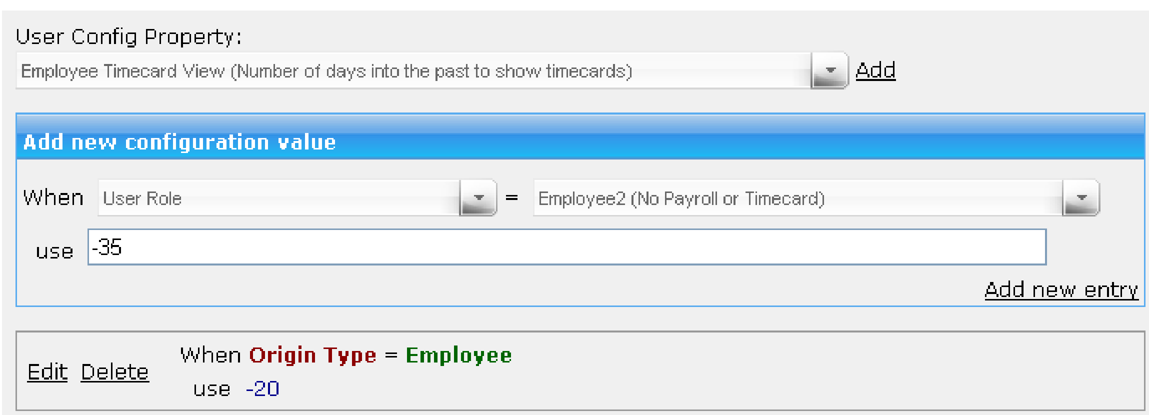
To configure the new information use the drop down menu in the upper left to select the type of role. Once this is selected the 2nd drop down menu will be automatically populated with records matching the role type selected. The last field is where the number of days should be manually entered. Once all fields have been populated, click on the *Add new entry* link to create the new configuration.

Employee Timecard View

The Employee Timecard View configuration allows the administrator to choose how many days into the past the employee can view timecards that they have created.



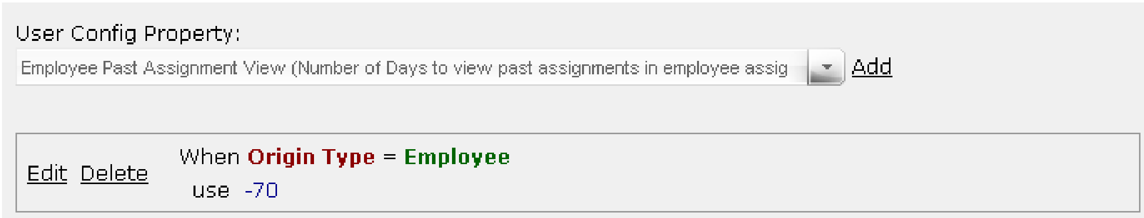
*Note – The steps for editing and deleting in the Employee Timecard View configuration are the same as in the Employee Paycheck View. The administrator should manually enter the number of days.



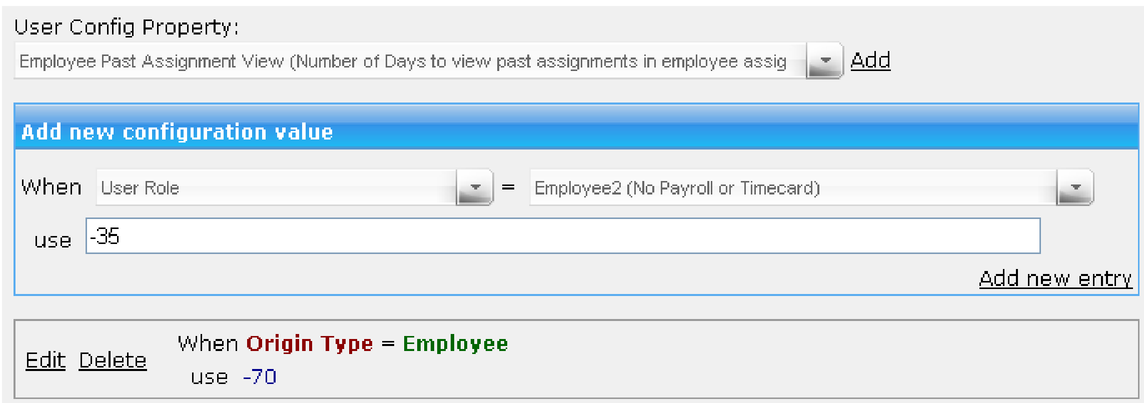
*Note – The steps for adding a new Employee Timecard View configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually change the number of days to add the configuration.

Employee Past Assignment View

The Employee Past Assignment View configuration allows the administrator to choose how many days into the past the employee can view their assignment history.



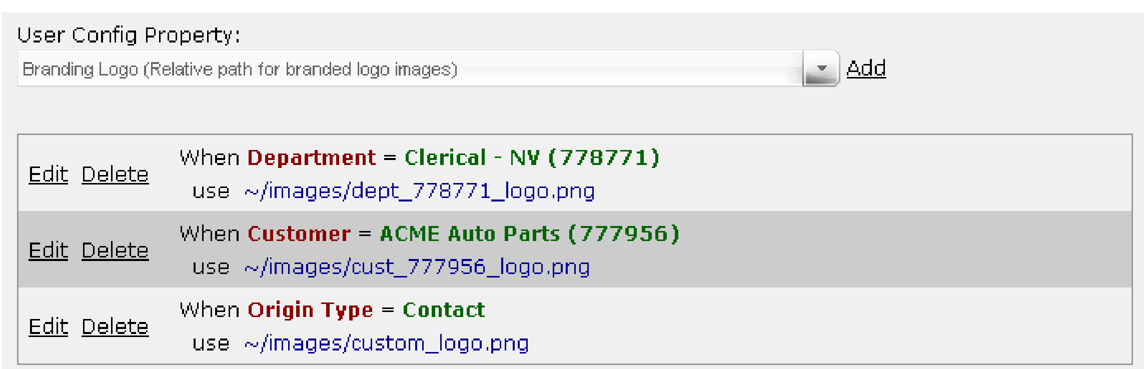
*Note – The steps for editing and deleting in the Employee Past Assignment View configuration are the same as in the Employee Paycheck View. The administrator should manually enter the number of days.



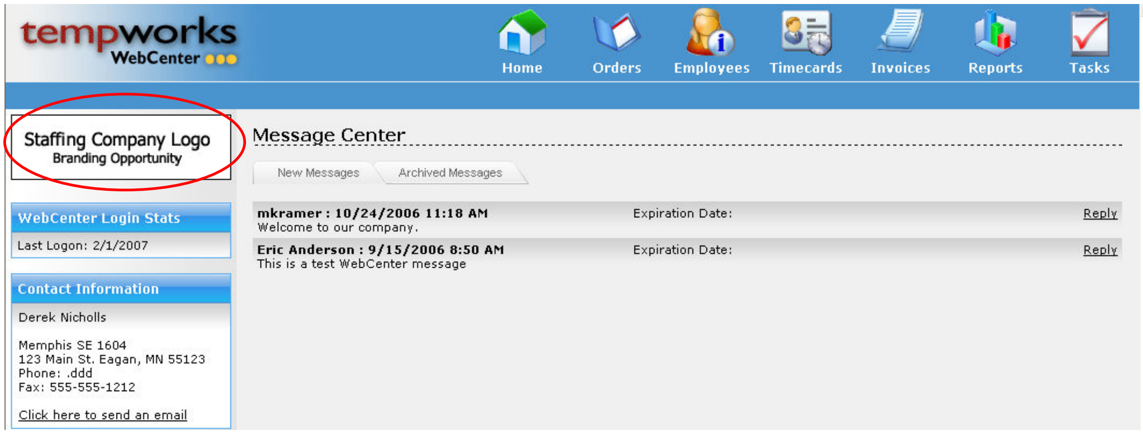
*Note – The steps for adding a new Employee Past Assignment View configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually change the number of days to add the configuration.

Branding Logo

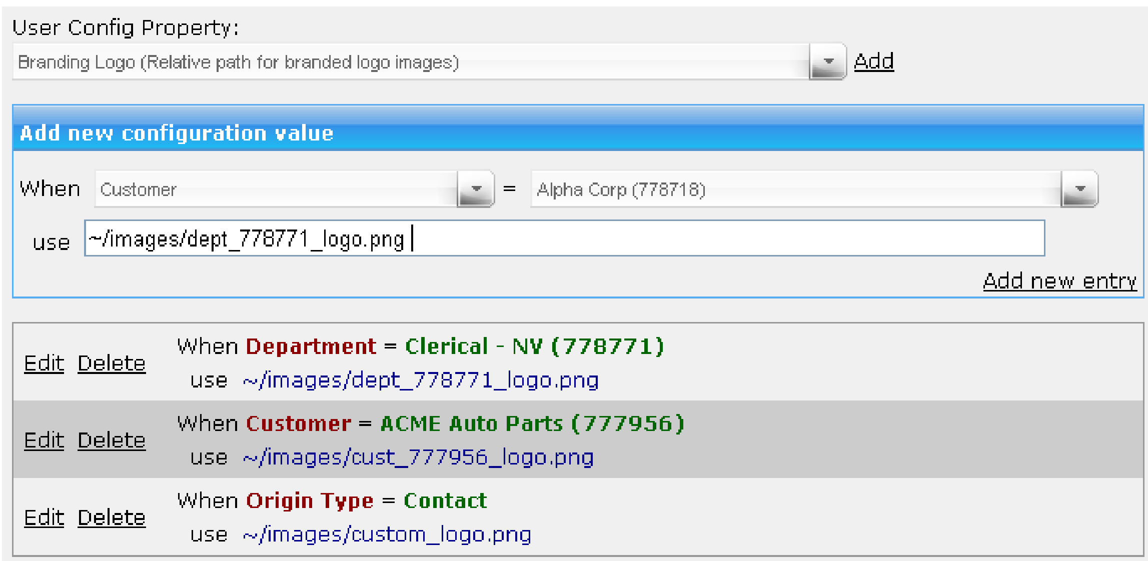
The Branding Logo configuration allows the administrator to customize a customer client's view of WebCenter *fx* by adding the client's logo to their customer portal **Home** page.



*Note – The steps for editing and deleting in the Branding Logo configuration are the same as in the Employee Paycheck View. The administrator should manually enter the file location where the logo image should be pulled from.



The area circled above in the customer contact record is what will be affected by the Branding Logo configuration.



*Note – The steps for adding a new Branding Logo configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter the file location where the logo image should be pulled from.

WebCenter Logo

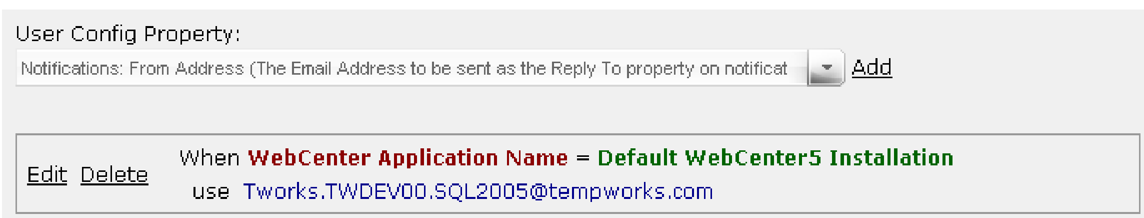
The WebCenter Logo configuration allows the administrator to customize WebCenter *fx* by adding the staffing company logo in the upper left corner of the page (instead of the Tempworks WebCenter logo that's shown throughout this manual).

*Note – The steps for editing and deleting in the WebCenter Logo configuration are the same as in the Employee Paycheck View. The administrator should manually enter the file location where the logo image should be pulled from.

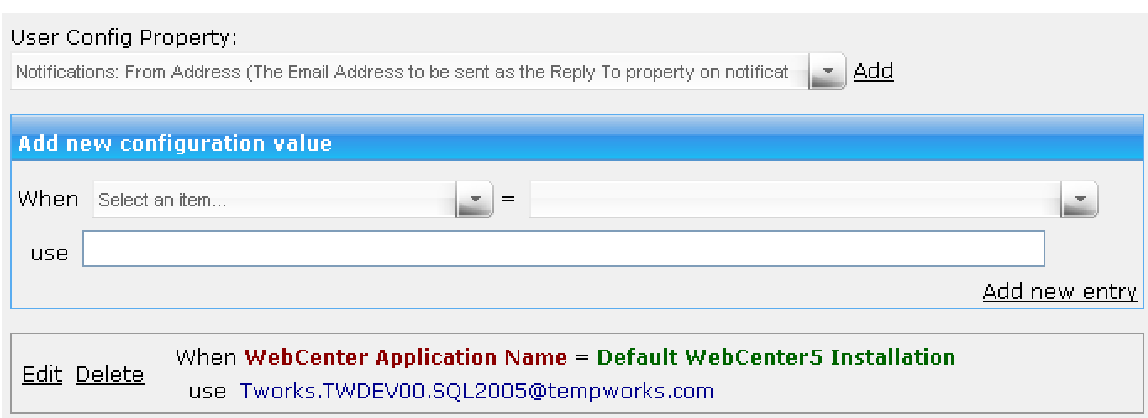
*Note – The steps for adding a new WebCenter Logo configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter the file location where the logo image should be pulled from.

Notifications: From Address

The Notifications: From Address configuration allows the administrator to create or change the "Reply To" address for email notifications sent from the WebCenter.



*Note – The steps for editing and deleting in the Notifications: From Address configuration are the same as in the Employee Paycheck View. The administrator should manually enter the email address that will be listed as the "Reply To" address on notifications emails.

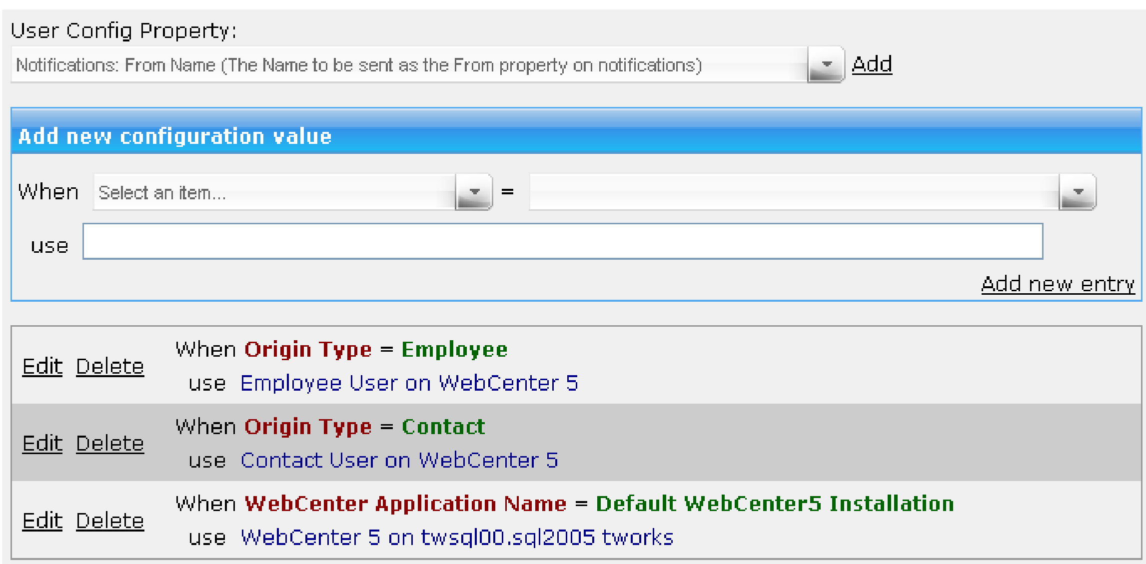


*Note – The steps for adding a new Notifications: From Address configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter the email address that will be listed as the "Reply To" address on notifications emails.

Notifications: From Name

The Notifications: From Name configuration allows the administrator to create or change the name that email notifications are "From" in WebCenter.

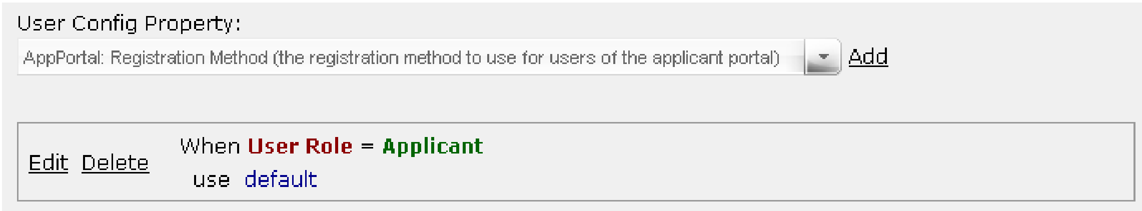
*Note – The steps for editing and deleting in the Notifications: From Name configuration are the same as in the Employee Paycheck View. The administrator should manually enter the name that will be listed as the "From" person on notifications emails.



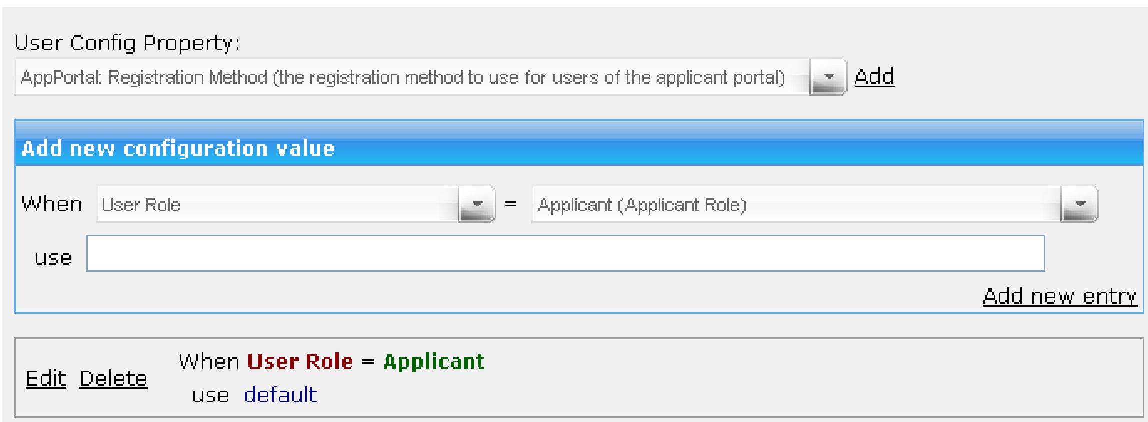
*Note – The steps for adding a new Notifications: From Name configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter the name that will be listed as the "From" person on notifications emails.

AppPortal: Registration Method

The AppPortal: Registration Method configuration allows the administrator to determine the registration method for users of the applicant portal.



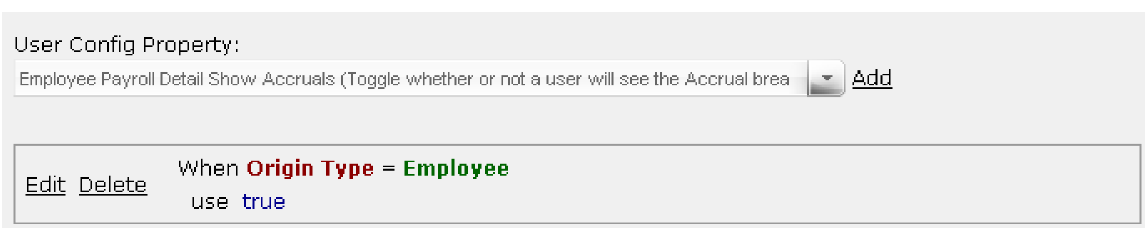
*Note – The steps for editing and deleting in the AppPortal: Registration Method configuration are the same as in the Employee Paycheck View. The administrator should manually enter the registration to use.



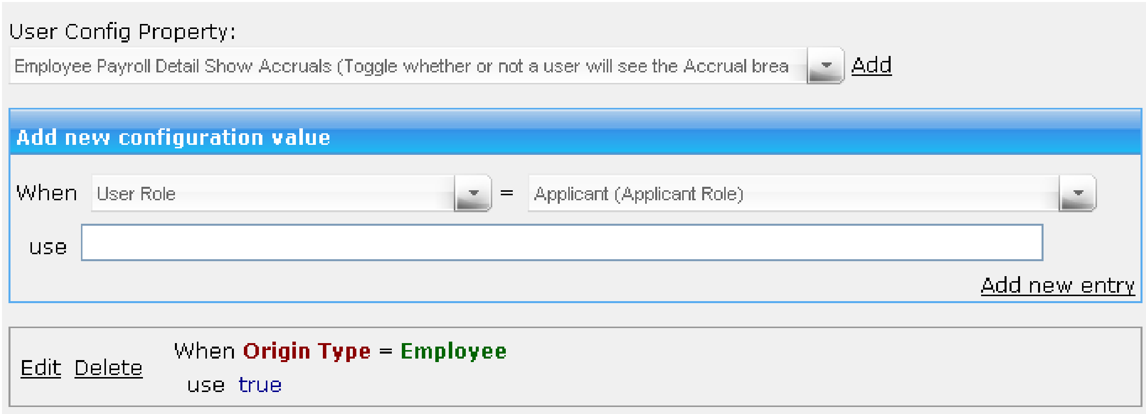
*Note – The steps for adding a new AppPortal: Registration Method configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter the registration to use.

Employee Payroll Detail Show Accruals

The Employee Payroll Detail Show Accruals configuration allows the administrator to determine if an employee can view accruals on the check details in the employee **Payroll** page.



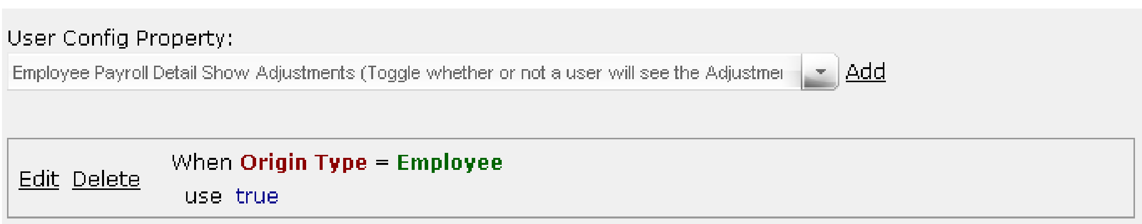
*Note – The steps for editing and deleting in the Employee Paryroll Detail Show Accruals configuration are the same as in the Employee Paycheck View. The administrator should manually enter "true" if the employee can view accruals on the check details or "false" if the employee cannot view accruals.



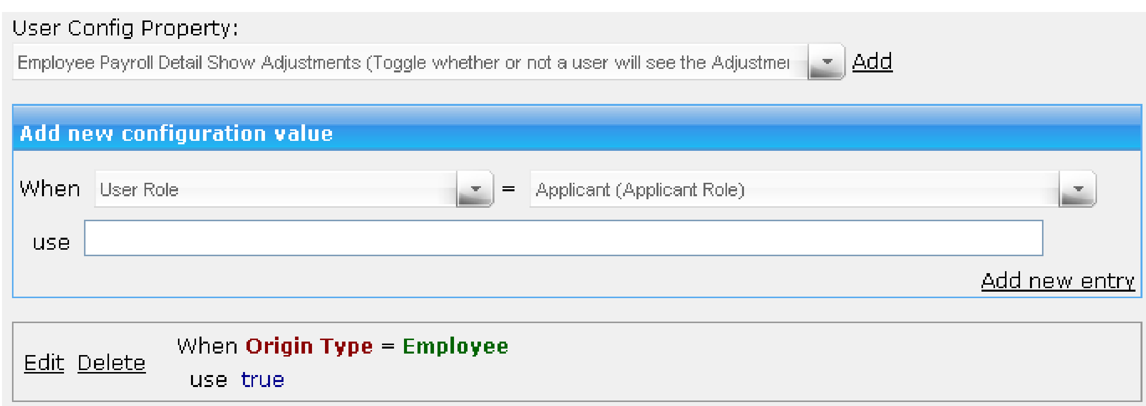
*Note – The steps for adding a new Employee Paryroll Detail Show Accruals configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter "true" if the employee can view accruals on the check details or "false" if the employee cannot view accruals.

Employee Payroll Detail Show Adjustments

The Employee Payroll Detail Show Adjustments configuration allows the administrator to determine if an employee can view adjustments on the check details in the employee **Payroll** page.



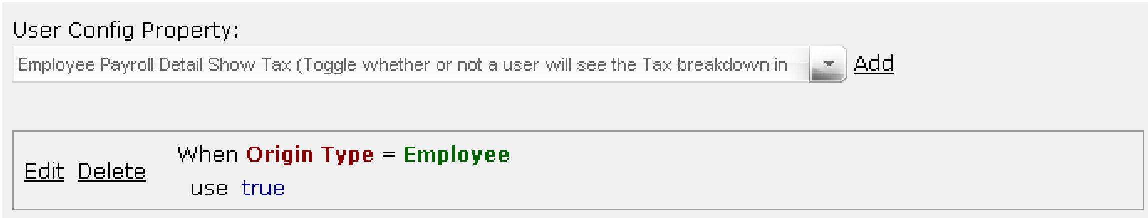
*Note – The steps for editing and deleting in the Employee Paryroll Detail Show Adjustments configuration are the same as in the Employee Paycheck View. The administrator should manually enter "true" if the employee can view adjustments on the check details or "false" if the employee cannot view adjustments.



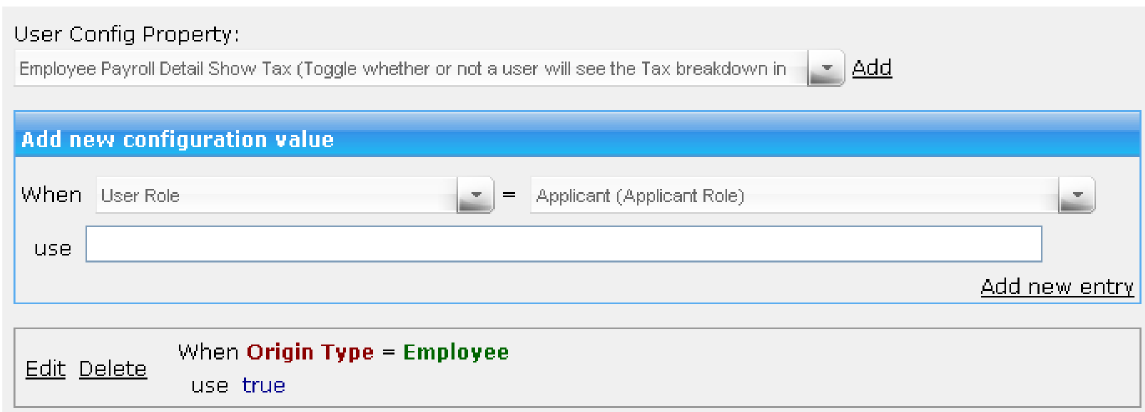
*Note – The steps for adding a new Employee Paryroll Detail Show Adjustments configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter "true" if the employee can view adjustments on the check details or "false" if the employee cannot view adjustments.

Employee Payroll Detail Show Tax

The Employee Payroll Detail Show Tax configuration allows the administrator to determine if an employee can view taxes on the check details in the employee **Payroll** page.



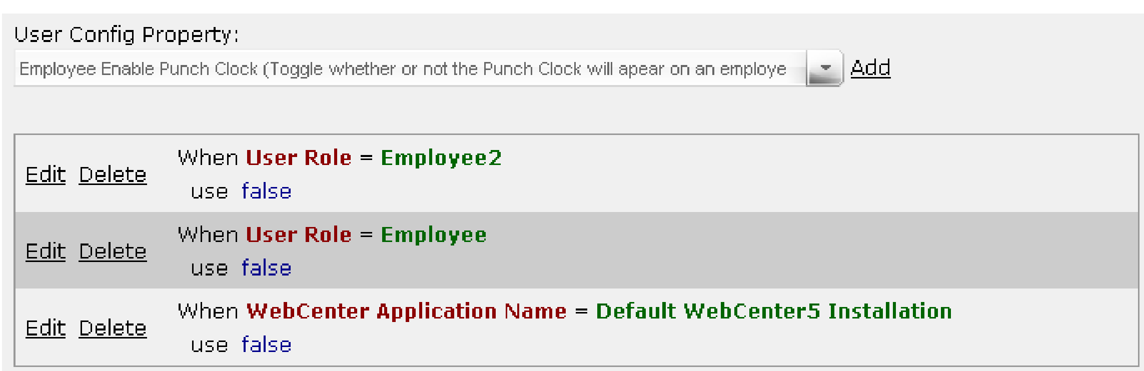
*Note – The steps for editing and deleting in the Employee Paryroll Detail Show Tax configuration are the same as in the Employee Paycheck View. The administrator should manually enter "true" if the employee can view taxes on the check details or "false" if the employee cannot view taxes.



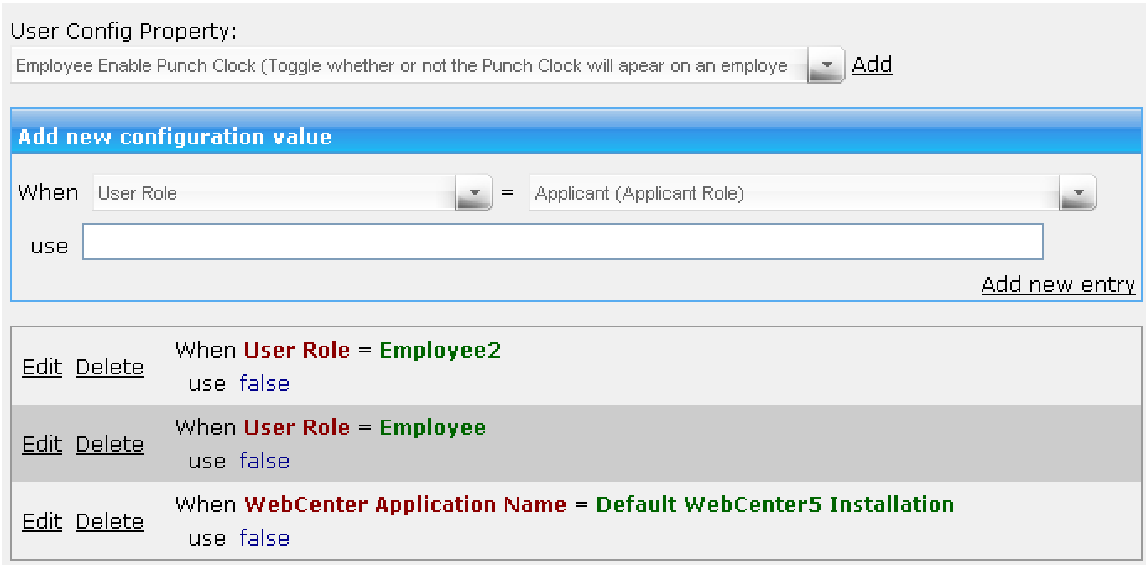
*Note – The steps for adding a new Employee Paryroll Detail Show Tax configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter "true" if the employee can view taxes on the check details or "false" if the employee cannot view taxes.

Employee Enable Punch Clock

The Employee Enable Punch Clock configuration allows the administrator to determine if an employee can view the **Punch Clock** tab from their **Home** page.



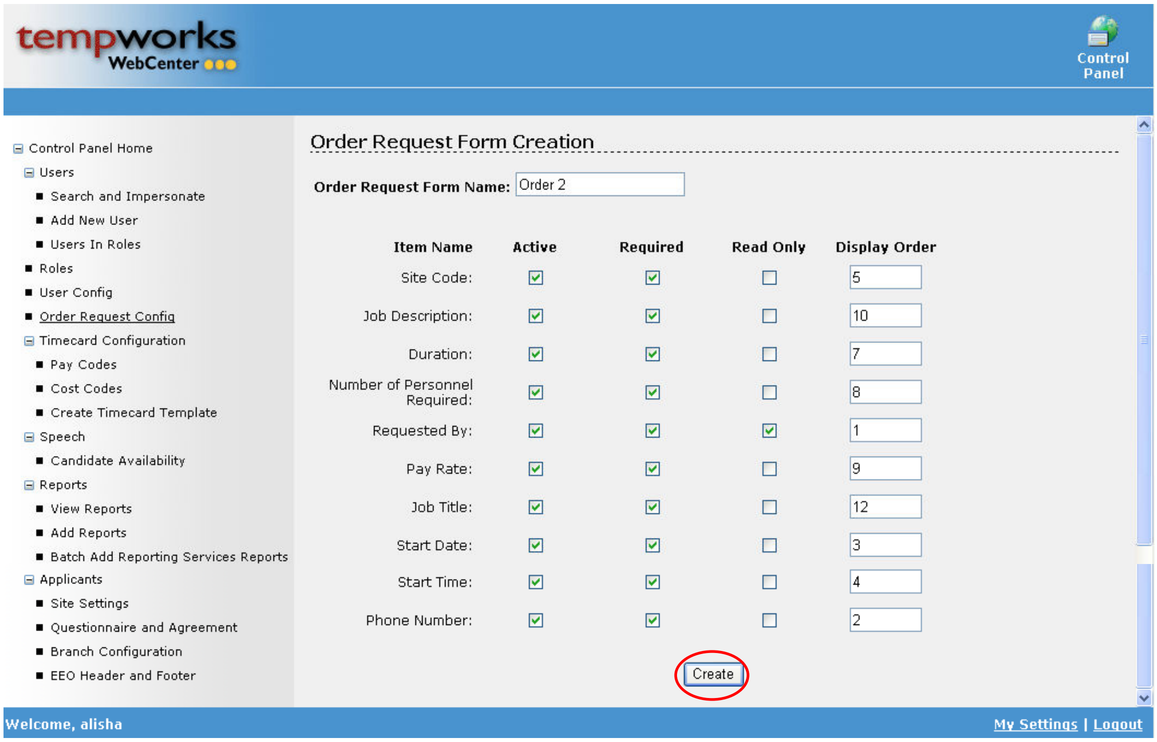
*Note – The steps for editing and deleting in the Employee Enable Punch Clock configuration are the same as in the Employee Paycheck View. The administrator should manually enter "true" if the employee can view the **Punch Clock** tab or "false" if the employee cannot view the tab.



*Note – The steps for adding a new Employee Enable Punch Clock configuration are the same as in the Employee Paycheck View. The administrator should use the drop down menus provided and manually enter "true" if the employee can view the **Punch Clock** tab or "false" if the employee cannot view the tab.

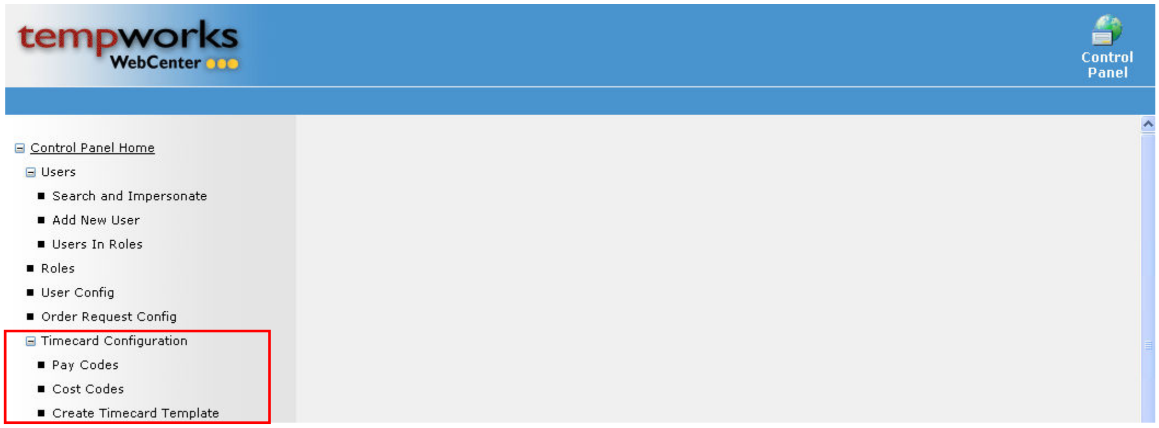
Order Request Config

The *Order Request Config* functionality allows an administrator to create or edit Order Request form screens for different customer contacts. To create a new Order Request form, enter the name of the form in the *Order Request Form Name* field, choose the fields to be *Active*, *Required*, or *Read Only* (by clicking in the appropriate check boxes) and determine the order in which the fields will be displayed by entering the number in the *Display Order* field. Once the form is completed, click on the *Create* button (as circled) to make the new Order Request form.



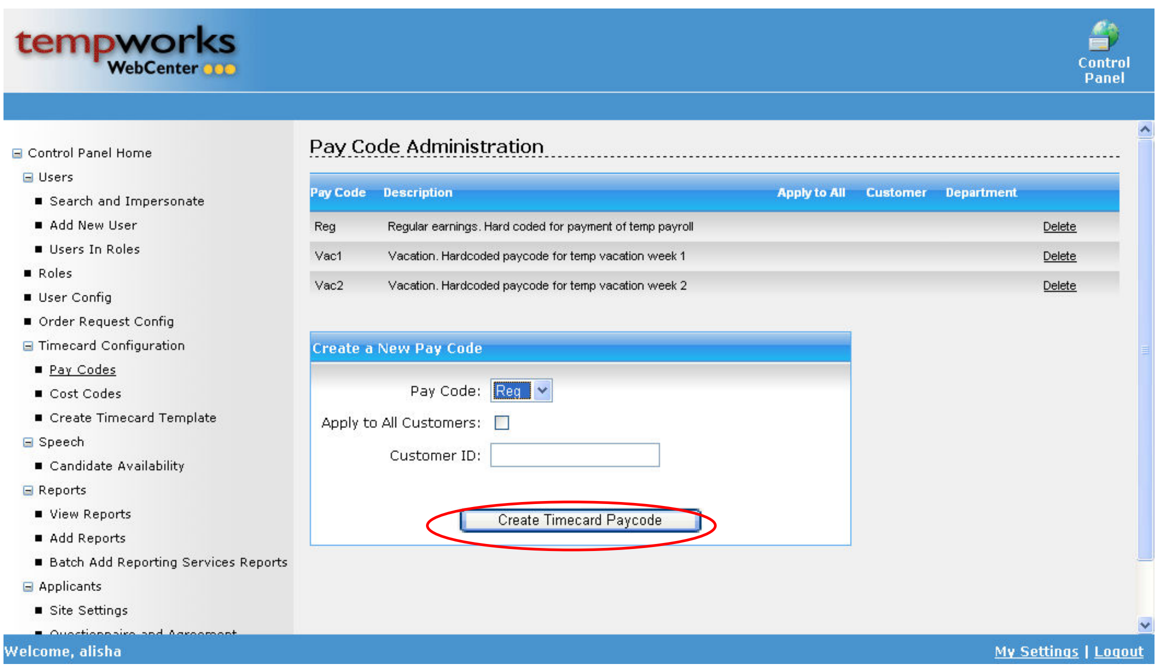
Administrator – Timecard Configuration

The are many features within the *Timecard Configuration* function including: creating paycodes, cost codes and creating or editing timecards for the WebCenter *fx* product.



Pay Codes

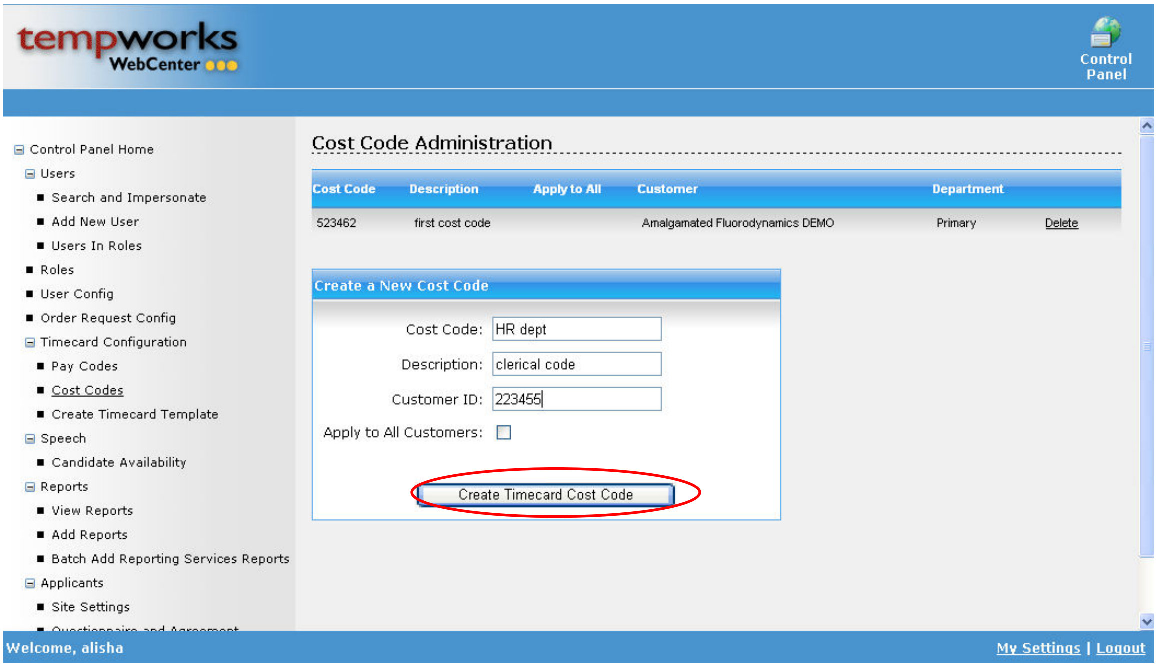
The *Pay Codes* functionality allows an administrator to create or edit time entry pay codes used in WebCenter. To access this function, click on the *Pay Codes* link on the left.



To delete a pay code, click on the *Delete* link on the right side of the corresponding line. To add a new pay code for a customer (or all customers) choose the code from the *Pay Code* drop down menu. If the code should be applied to all customers click in the box for *Apply to All Customers*. If the code only applies to one customer enter their unique Tempworks created number in the *Customer ID* field. Once the correct fields are populated, click on the *Create Timecard Paycode* button to add the new code.

Cost Codes

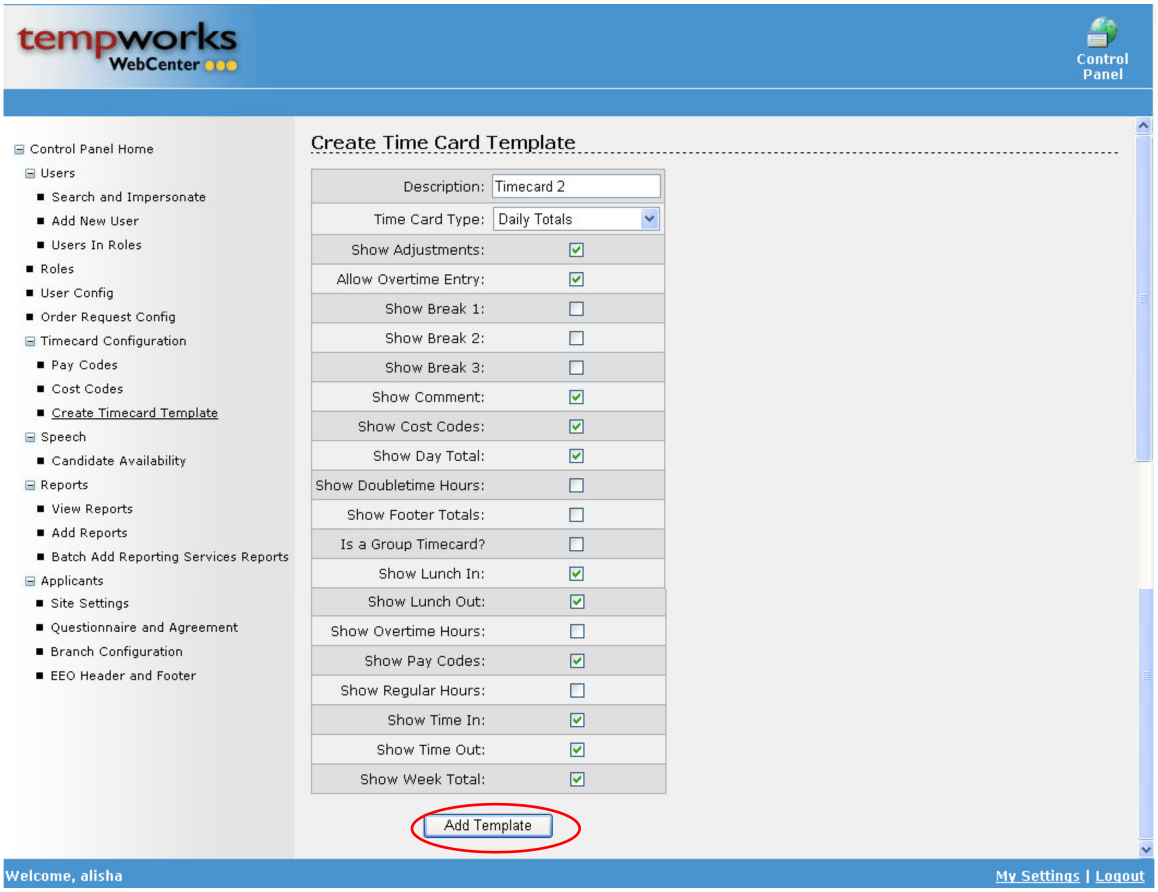
The *Cost Codes* functionality allows an administrator to create or edit invoicing cost codes used in WebCenter. To access this function, click on the *Cost Codes* link on the left.



To delete a cost code, click on the *Delete* link on the right side of the corresponding line. To add a new cost code for a customer (or all customers) enter the code name in the *Cost Code* field and enter the description for the code in the *Description* field. If the code only applies to one customer enter their unique Tempworks created number in the *Customer ID* field. If the code should be applied to all customers click in the box for *Apply to All Customers*. Once the correct fields are populated, click on the *Create Timecard Cost Code* button to add the new code.

Create Timecard Template

The *Create Timecard Template* functionality allows an administrator to add new timecards that can be viewed by different users. To access this function, click on the *Create Timecard Template* link on the left.



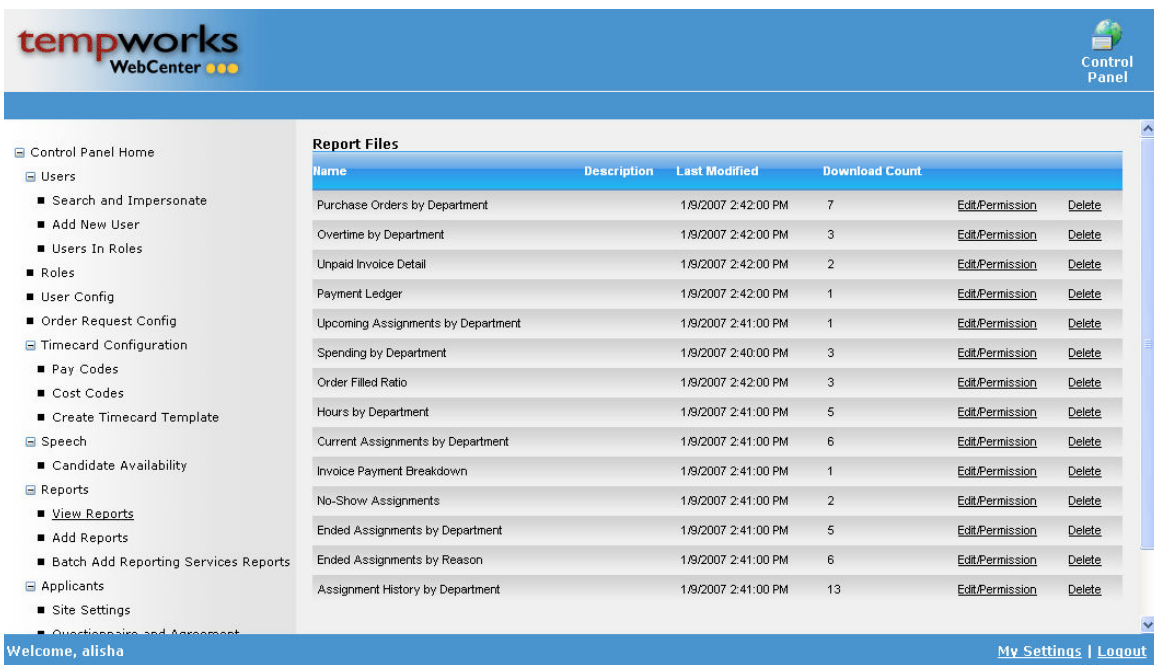
To create a new Timecard, enter the name of the timecard in the *Description* field. Choose the type of timecard to be used from the *Time Card Type* drop down menu. Next, select the fields that should be visible in the timecard by clicking in the box in the corresponding row. When all of this has been completed, click on the *Add Template* button to create the new timecard.

Administrator – Reports

There are many features within the *Reports* function including: setting permissions for accessing reports, adding new reports to the WebCenter and miscellaneous reporting services.

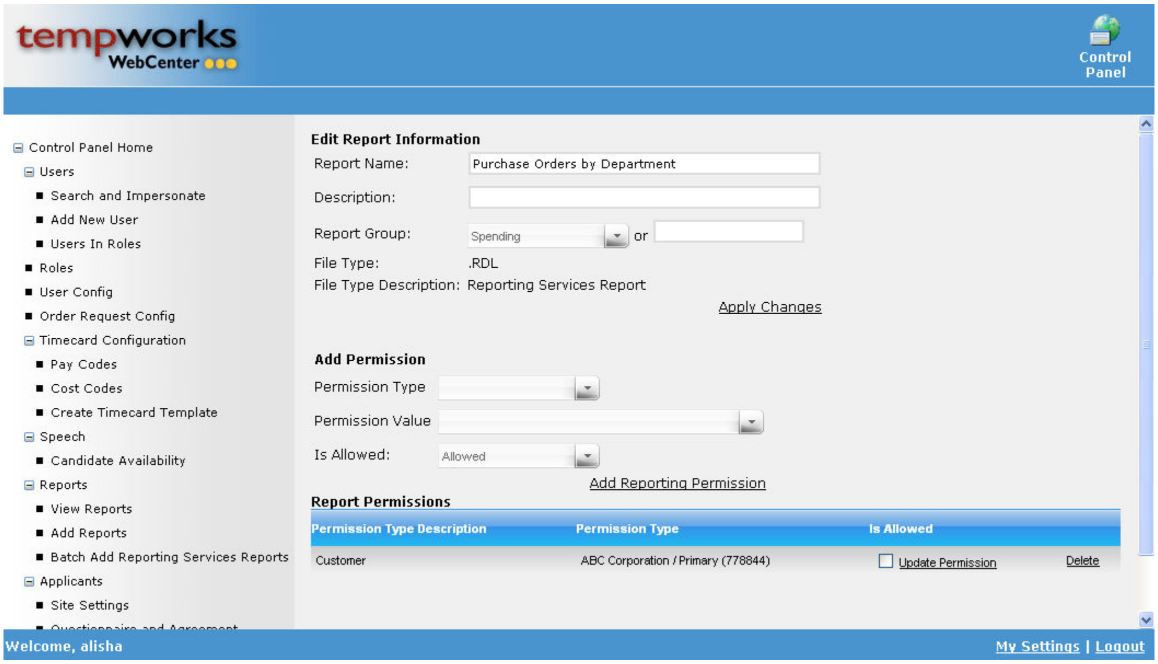
View Reports

The *View Reports* functionality allows an administrator to edit reports and assign report permissions within WebCenter. To access this function, click on the *View Reports* link on the left.



To delete a report, click on the *Delete* link on the corresponding line. To edit an existing report or assign permissions to users able to view the report, click on the *Edit/Permission* link to select the report to be edited.

When the *Edit/Permission* link is clicked, the following view will be displayed.



In the Edit Report Information section the report can be edited by changing or adding information to the following fields: *Report Name*, *Description*, or *Report Group* (drop down menu or open input field). When the changes have been completed, click on the *Apply Changes* link to update the report.

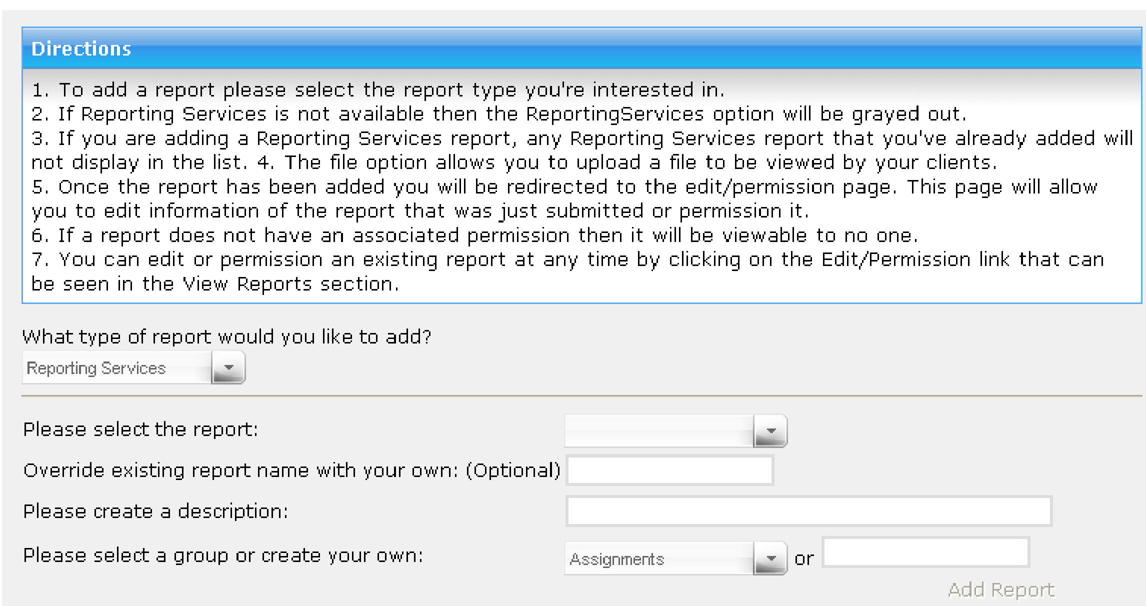
In the Add Permission section the administrator can determine what types of users (individuals or clients) that can or cannot view the report. Use the drop down menus to select the *Permission Type*, *Permission Value*, and *Is Allowed* and then click on the *Add Reporting Permission* link to add the permission to the report.

If a report's permission should be changed, the administrator will use the Report Permissions section. To change a report from allowing access to denying access (or vice versa), click in the *Is Allowed* check box and then click on the *Update Permission* link. To delete a current permission click on the *Delete* link on the corresponding line.

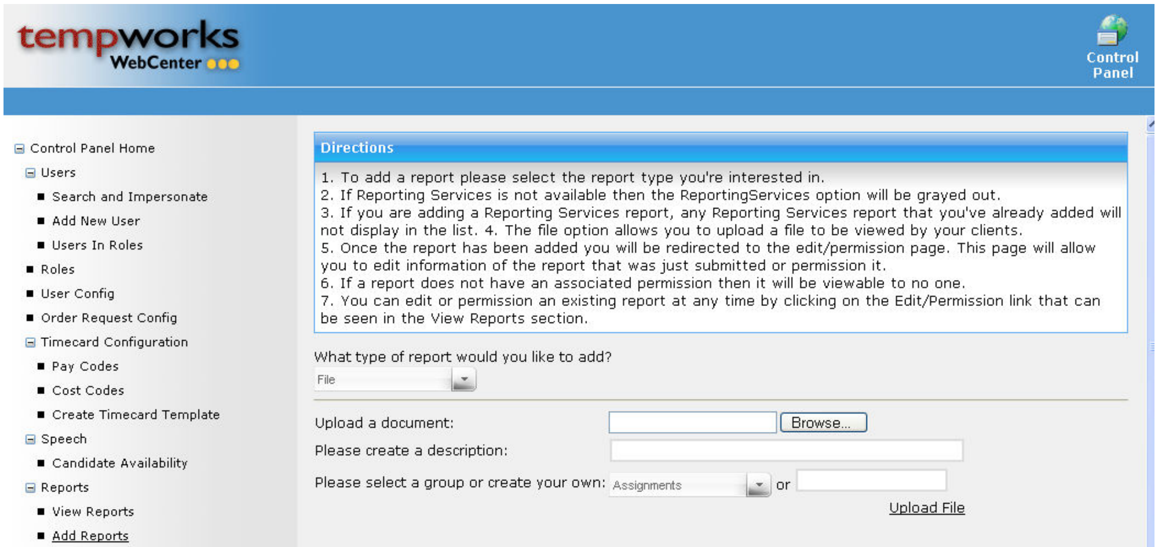
Add Reports

The *Add Reports* functionality allows an administrator to add reports to reporting services, or upload reports from a file. To access this function, click on the *Add Reports* link on the left.

To add a new report to the WebCenter follow the information as listed in the Directions section. First select a report from the *Select Report Type* drop down menu. If the user selects "Reporting Services" from the menu then the following view will be displayed.



Choose a report from the *Please select the report* drop down menu. If the user would like to change the report name enter the new name in the *Override existing report name with your own* field. Enter a description for the report in the *Please create a description* field. In the *Please select a group or create your* *own* field choose a group from the drop down menu or enter a group manually in the field on the right. Once all of the fields have been populated, click on the *Add Report* link on the right.

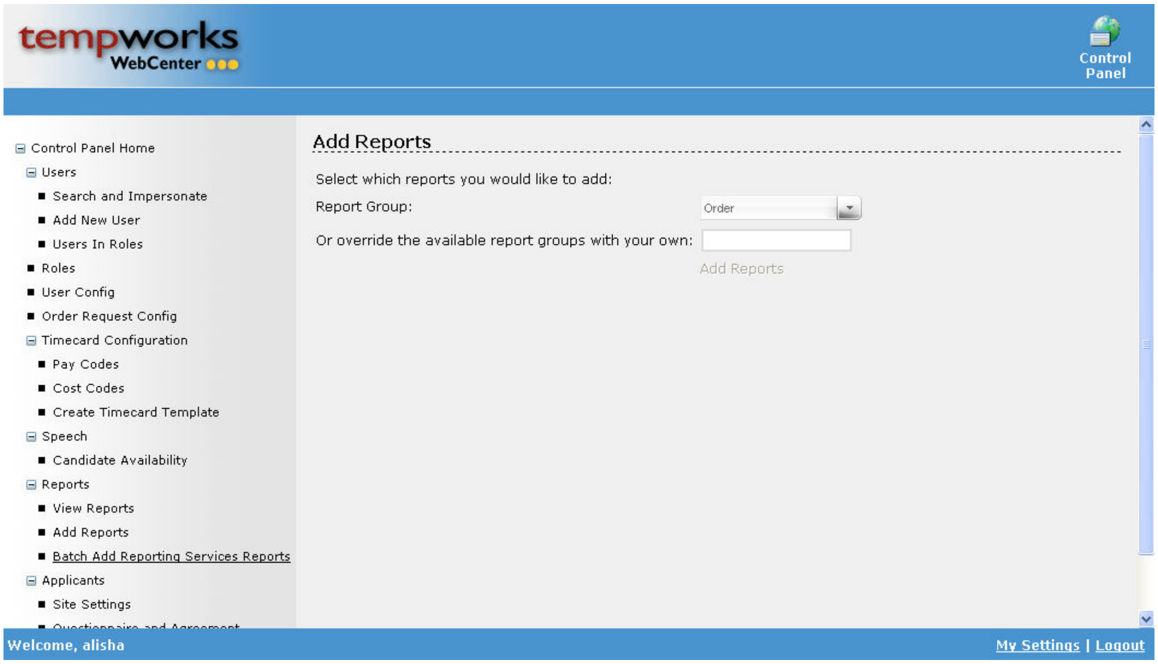


If the user selects "File" from the menu then the view above will be displayed. Upload the document by adding the file name location to the *Upload a document* field or use the *Browse* button to open and view documents on a shared drive or hard drive. Enter the necessary information in the *Please create a description* field and then set up the group by using the drop down menu or manual input for the *Please select a group or create your own* field. Once the information has been entered click on the *Upload File* link to attach the file to WebCenter.

Once the report has been added to WebCenter navigate to the *View Reports* functionality to assign permissions and make the report visible to users.

Batch Add Reporting Services Reports

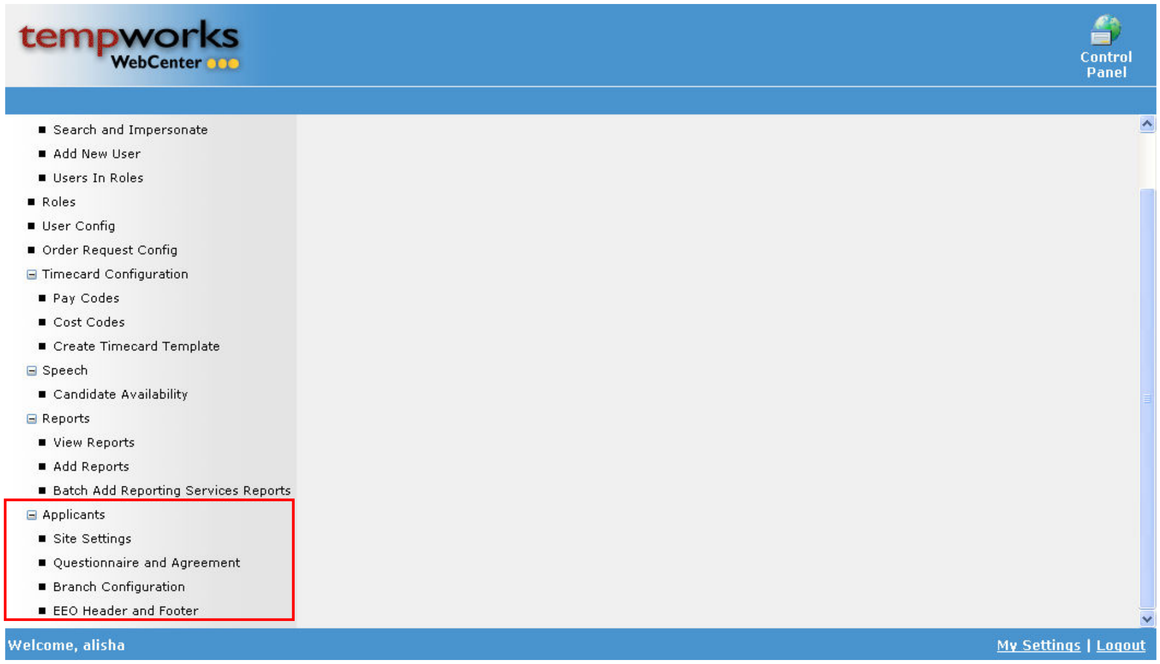
The *Batch Add Reporting Services Reports* functionality allows an administrator to add a group of reports from reporting services. To access this function, click on the *Batch Add Reporting Services Reports* link on the left.



To add reports using the batch add function, choose a group from the *Report Group* drop down menu. The administrator can enter information in the *Or override the available report groups with your own* field to change the group names. The user can then click on the *Add Reports* link to upload the group of reports.

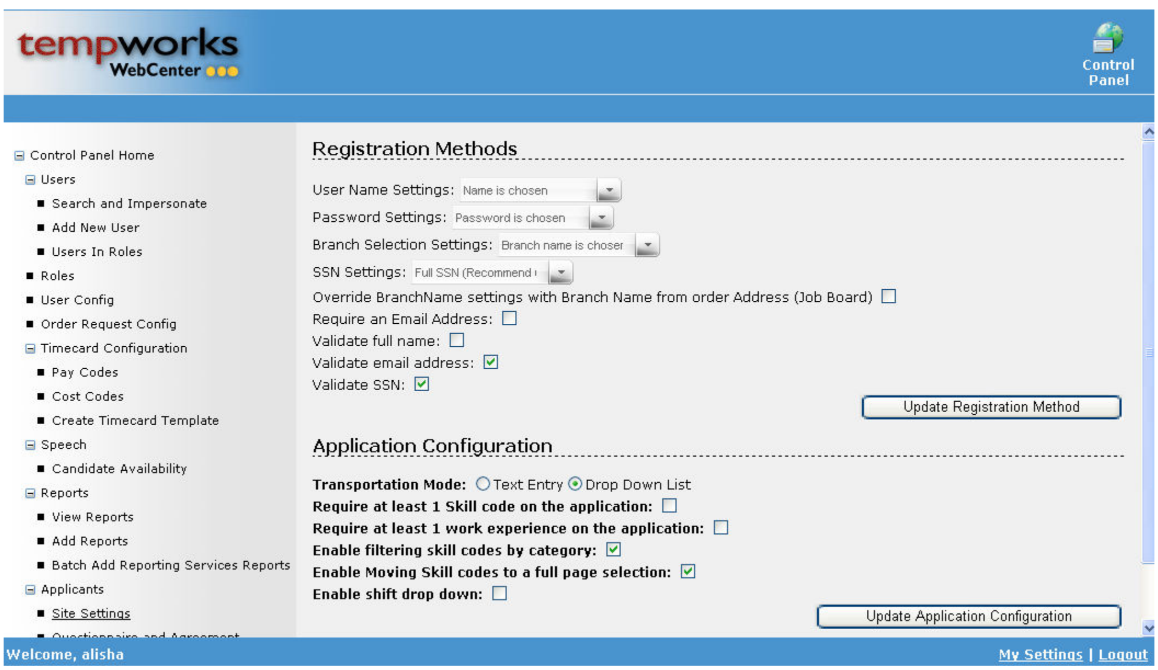
Administrator – Applicants

There are many features within the *Applicants* function including: setting how the site looks, questionnaire information and configuring the branch.



Site Settings

The *Site Settings* functionality allows an administrator to select registration methods for applicants as well as configuring the application. To access this function, click on the *Site Settings* link on the left.

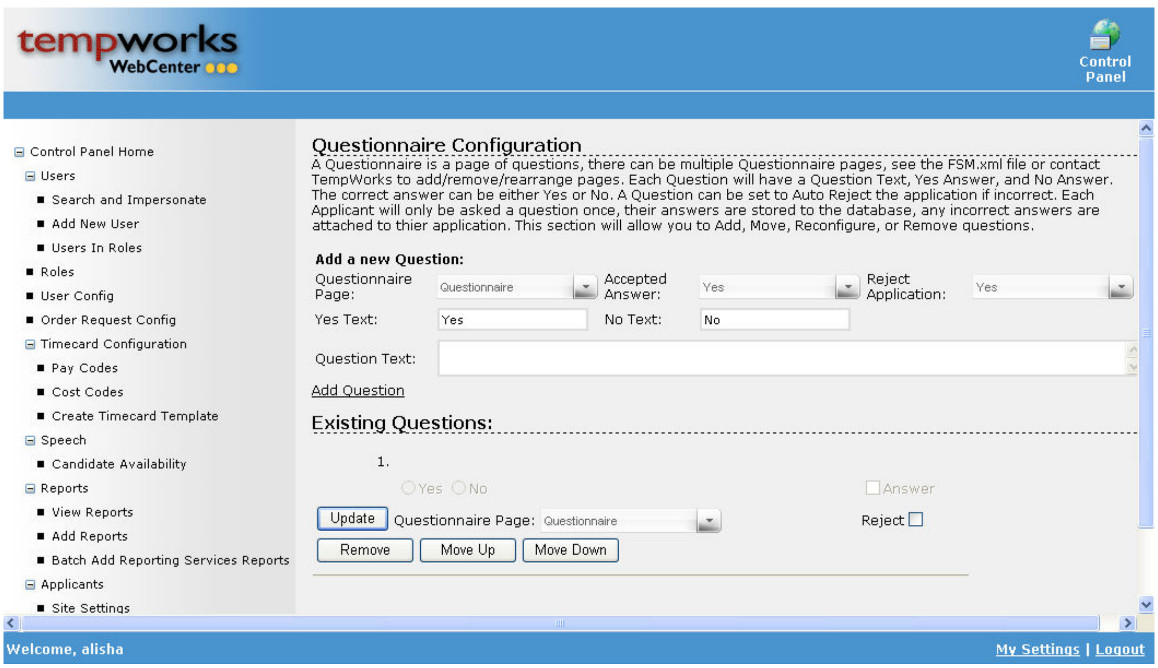


In the Registration Methods area the administrator can determine how an applicant registers themselves in the WebCenter. There are drop down menus for *User Name Settings*, *Password Settings*, *Branch Selection Settings*, and *SSN settings*. There are check boxes for *Override BranchName settings with Branch Name from order Address*, *Require an Email Address*, *Validate full name*, *Validate email address*, and *Validate SSN*. Once all of these fields are appropriately populated, click on the *Update Registration Method* button to change the applicant registration settings.

In the Application Configuration section the administrator can determine which fields on the application will be considered "required entry" fields. In the *Transportation Mode* circles click to determine if the applicant will use a drop down menu in the application or if they will be able to manually enter their mode of transportation. All of the other check boxes in this section will determine what the applicant is required to fill out or determines how the applicant is able to view information from the Online application. Once all of the fields have been appropriately checked, click on the *Update Application Configuration* button to change the application settings and requirements.

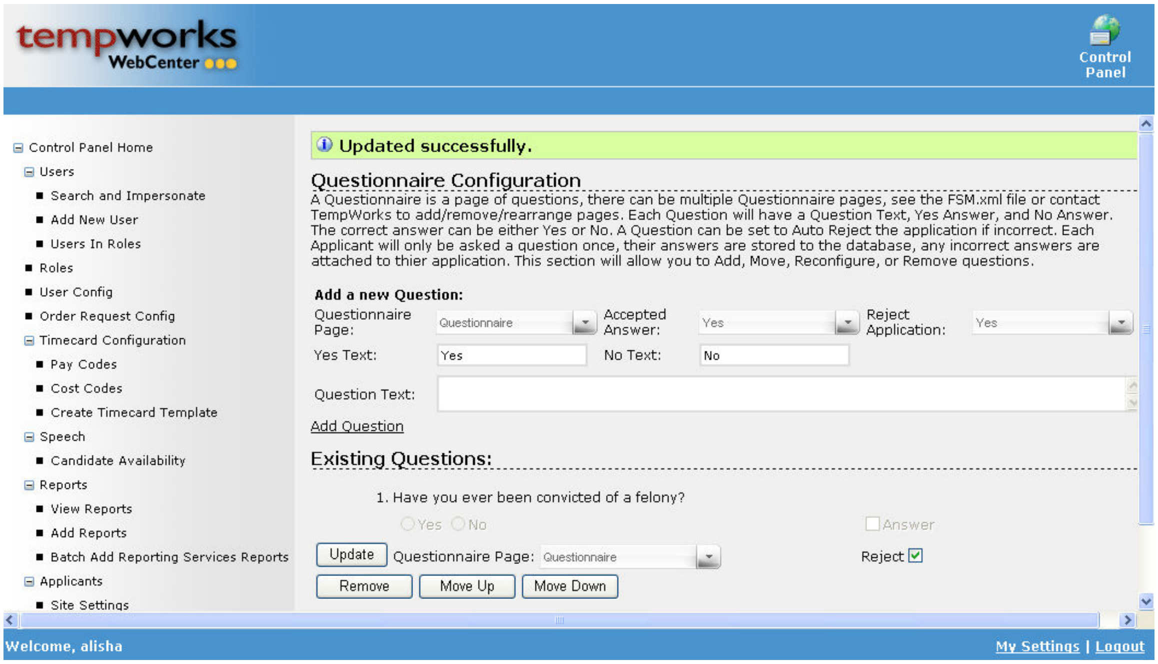
Questionnaire and Agreement

The *Questionnaire and Agreement* functionality allows an administrator to change questions included in the questionnaire in the Online Application. To access this function, click on the *Questionnaire and Agreement* link on the left.



To add questions to the Questionnaire or Agreement select the appropriate choice from the *Questionnaire Page* drop down menu. The user will then select the *Accepted Answer* and *Reject Application* choices from the appropriate drop down menus. Next the question should be added in the *Question Text* open form field. Once this is completed, click on the *Add Question* link.

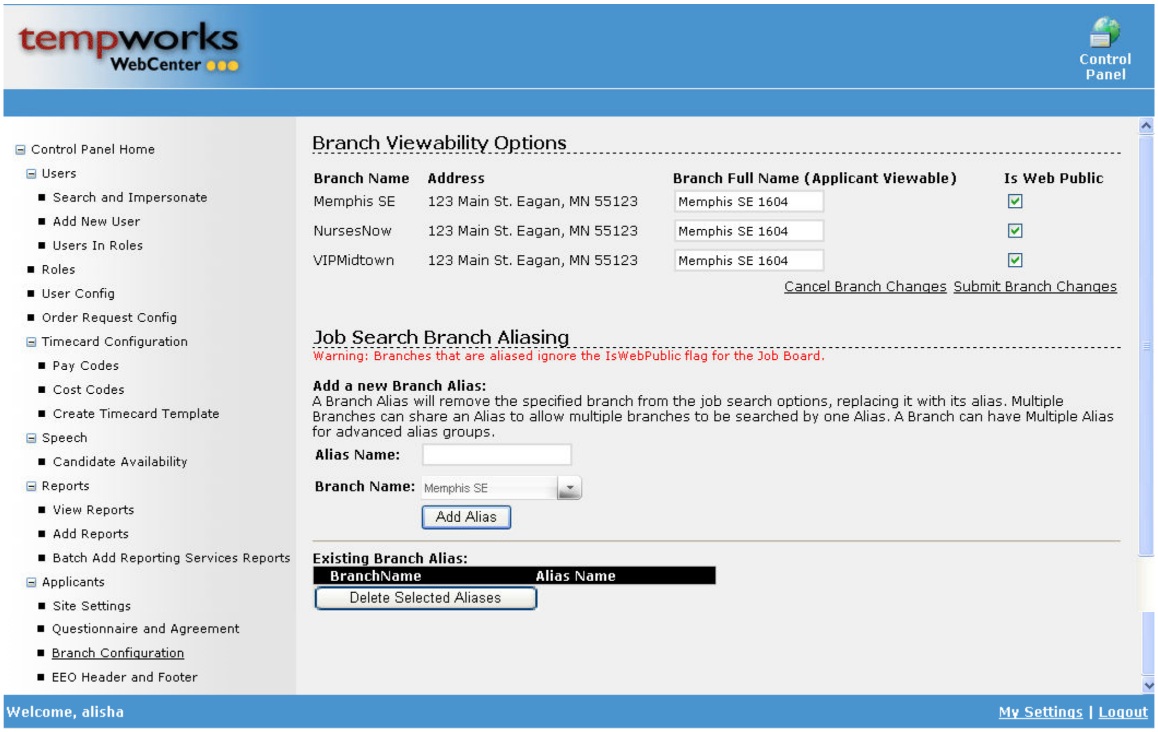
Once a question has been added, a view like the one below will be displayed.



To make changes to existing questions the user can choose a different selection from the *Questionnaire Page* drop down menu. The user can also add (or remove) the check mark from the *Reject* check box. Click on the *Update* button once all of the changes are complete. If the question should not be on the form, click on the *Remove* button. To change the question order for the selected question use the *Move Up* or *Move Down* buttons as appropriate.

Branch Configuration

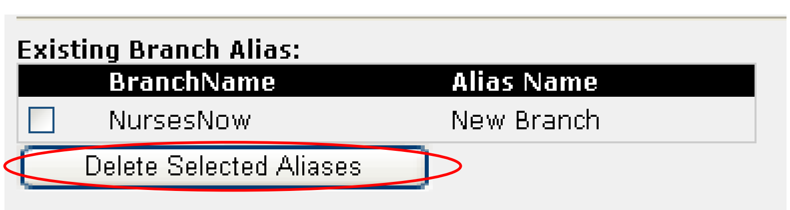
The *Branch Configuration* functionality allows an administrator to change the branch settings for WebCenter *fx*. To access this function, click on the *Branch Configuration* link on the left.



In the Branch Viewability Options section the administrator can change how the branch name is viewed by entering or changing the information in the *Branch Full Name* field. The check box for *Is Web Public* should be checked if the branch should be visible for all WebCenter users. If the branch information has been changed but the user does not want to submit the changes, click on the *Cancel Branch Changes* link to revert to previous entries. If the information should be changed, click on the *Submit Branch Changes* link to update the information.

In the Job Search Branch Aliasing section the user can add an *Alias Name* in the manual input field and choose the *Branch Name* from the drop down that should receive that alias. Once an alias has been entered the administrator should click on the *Add Alias* button to create the new branch alias.

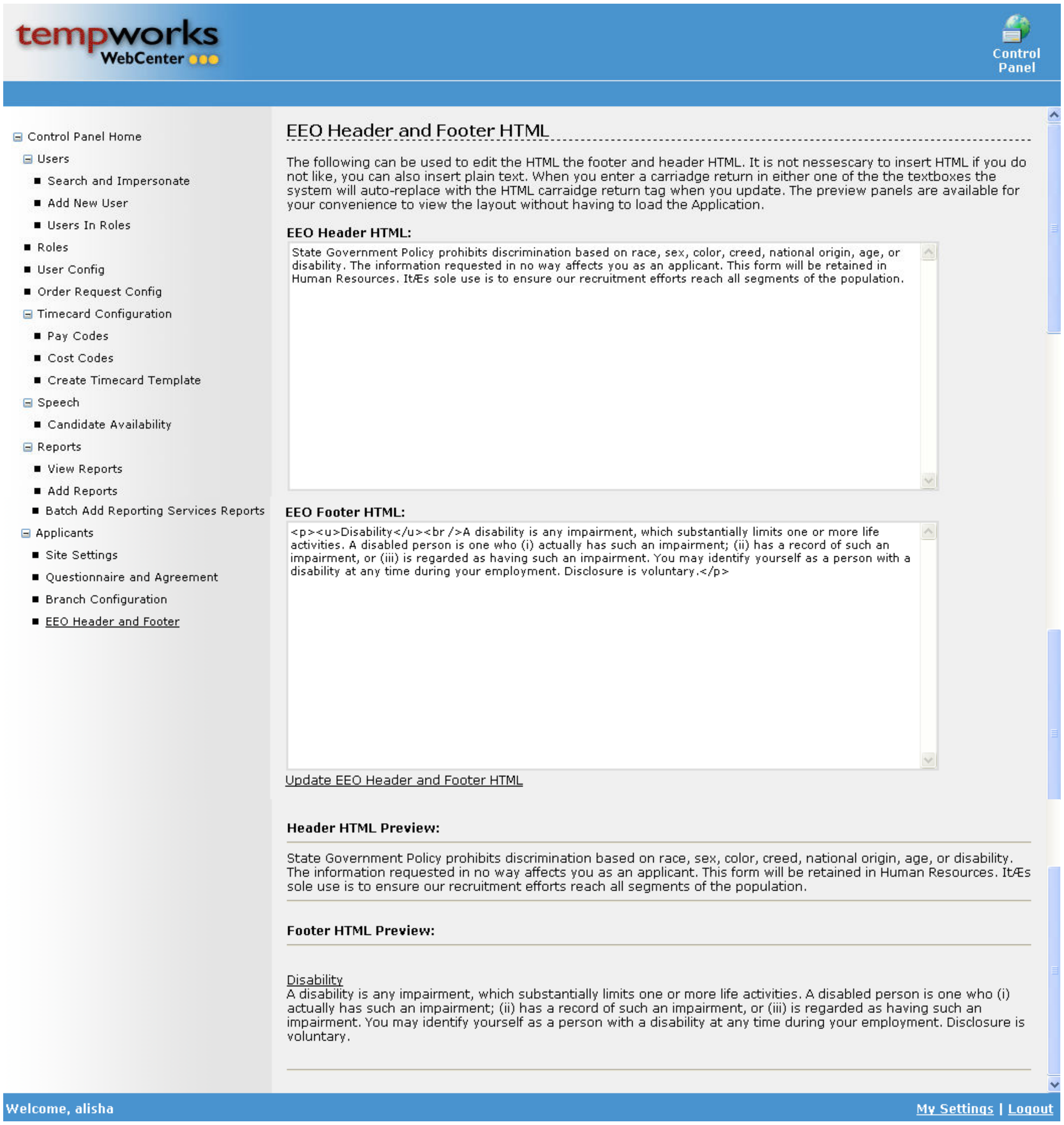
In the Existing Branch Alias section any branches with current aliases will be displayed.



To delete an existing branch alias, click in the check box to the left of the *BranchName* and then click on the *Delete Selected Aliases* button.

EEO Header and Footer

The *EEO Header and Footer* functionality allows an administrator to customize the equal opportunity statement listed on the Online application in WebCenter *fx*. To access this function, click on the *EEO Header and Footer* link on the left.



In the *EEO Header HTML* free form field an administrator can add the text that should be visible on the Online application.

EEO Header HTML:

State Government Policy prohibits discrimination based on race, sex, color, creed, national origin, age, or disability. The information requested in no way affects you as an applicant. This form will be retained in Human Resources. ItÆs sole use is to ensure our recruitment efforts reach all segments of the population.

In the *EEO Footer HTML* free form field an administrator can add the text that should be visible on the Online application.

EEO Footer HTML:

<p><u>Disability</u>
A disability is any impairment, which substantially limits one or more life activities. A disabled person is one who (i) actually has such an impairment; (ii) has a record of such an impairment, or (iii) is regarded as having such an impairment. You may identify yourself as a person with a disability at any time during your employment. Disclosure is voluntary.</p>

Update EEO Header and Footer HTML

Once the information in the header or footer has been updated, click on the *Update EEO Header and Footer HTML* link to make the changes to the Online Application.

Once the changes have been made they will be visible at the bottom of the page (as shown below).

Header HTML Preview:

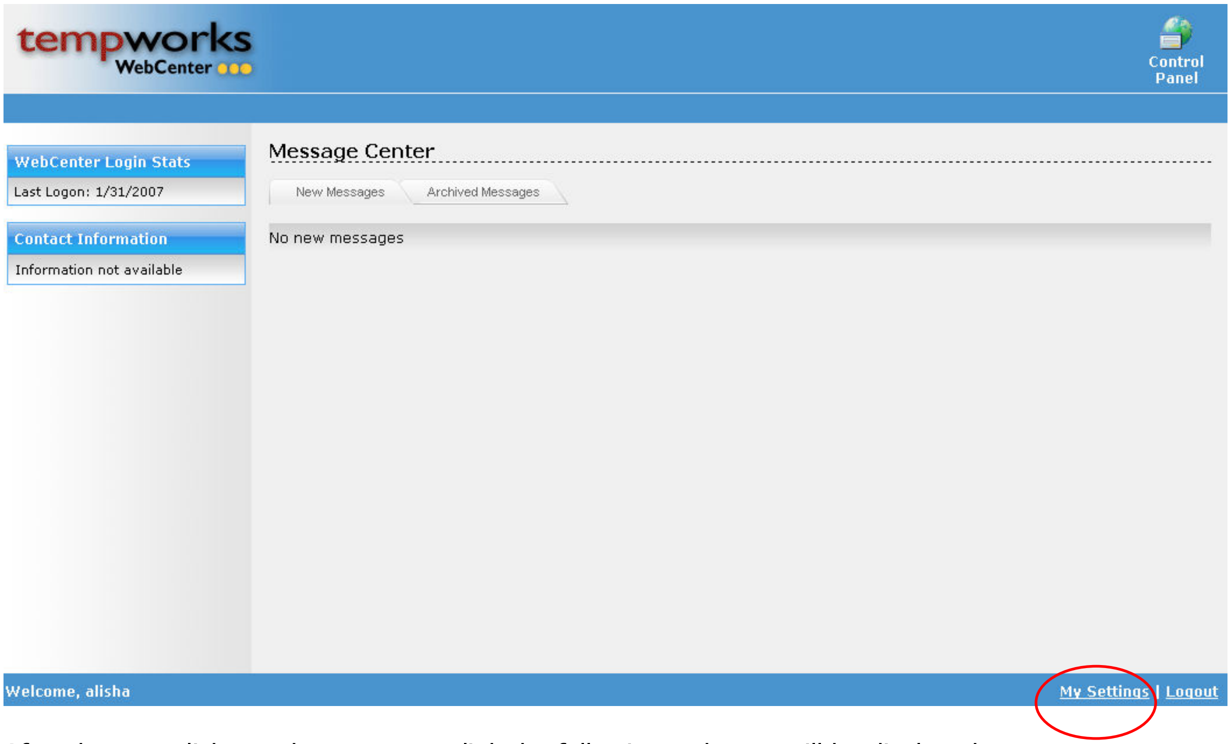
State Government Policy prohibits discrimination based on race, sex, color, creed, national origin, age, or disability. The information requested in no way affects you as an applicant. This form will be retained in Human Resources. ItÆs sole use is to ensure our recruitment efforts reach all segments of the population.

Footer HTML Preview:

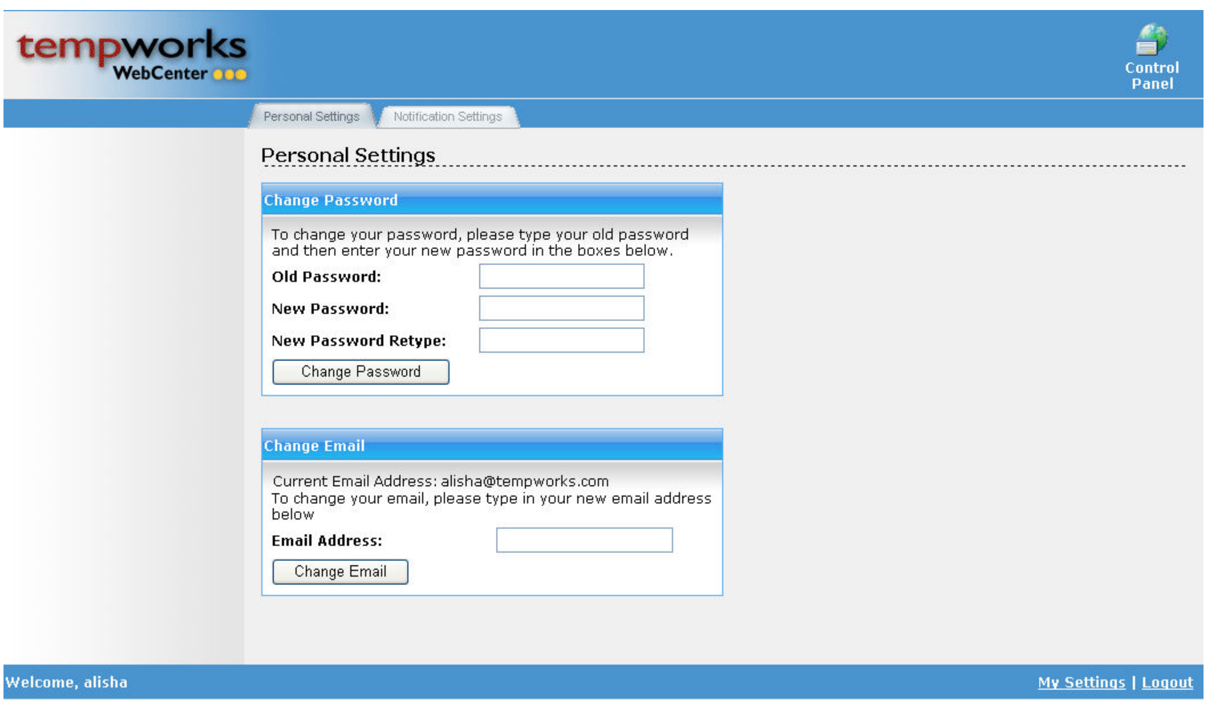
Disability
A disability is any impairment, which substantially limits one or more life activities. A disabled person is one who (i) actually has such an impairment; (ii) has a record of such an impairment, or (iii) is regarded as having such an impairment. You may identify yourself as a person with a disability at any time during your employment. Disclosure is voluntary.

Administrator – My Settings Page

In the lower right corner of the webpage is the *My Settings* link which will navigate the user to the **My Settings** page where the administrator can change their password or update their email address. To navigate to this page click on the *My Settings* link as circled below.

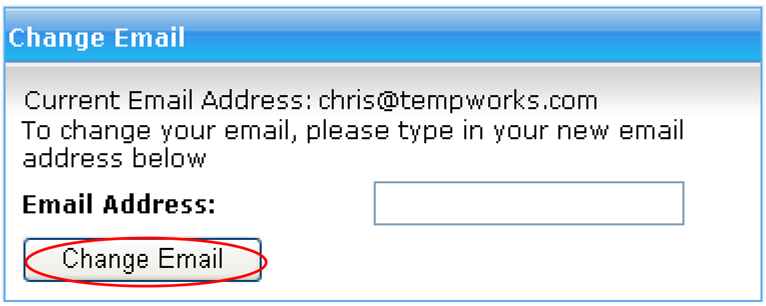


After the user clicks on the *My Settings* link the following webpage will be displayed:



In the **My Settings** page there are two tabs: *Personal Settings* and *Notification Settings*. The *Personal Settings* tab view will be displayed when a user first navigates to the **My Settings** page. In this tab there are two sections: Change Password and Change Email.

To change the users WebCenter *fx* password they will have to enter the current password in the *Old Password* input field. Next think of a new password and enter it in the *New Password* input field. The administrator should then duplicate the new password entry in the *New Password Retype* input field. Once all fields have been populated correctly click on the *Change Password* button (as circled) to create the password.



To change the user's notification email address for WebCenter *fx* the administrator should enter the desired email address in the *Email Address* input field. Once this is completed click on the *Change Email* button (as circled) to update.

*Note – The Notification Settings tab is currently under development. This manual will be updated as more features and functionality are created for WebCenter *fx*.