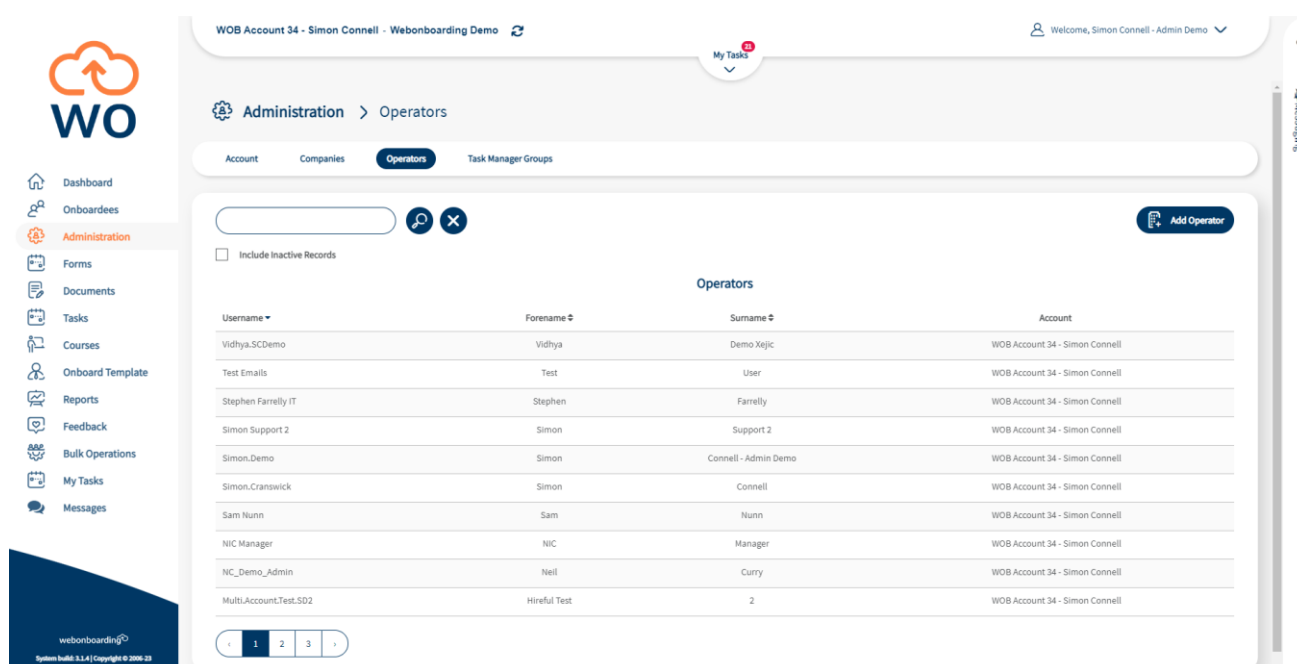


Operators

Operators is the name we use for internal users of Webonboarding and is where you can set up access for your HR users, Managers and Task Managers.

Creating an Operator

From the Menu, navigate to Administration then to Operators.



The screenshot displays the 'Administration > Operators' page in the Webonboarding system. The left sidebar contains a navigation menu with options like Dashboard, Onboarders, Administration (highlighted), Forms, Documents, Tasks, Courses, Onboard Template, Reports, Feedback, Bulk Operations, My Tasks, and Messages. The main content area shows a table of operators. At the top right of the main area is an 'Add Operator' button. Below the table is a pagination control showing page 1 of 3.

Username	Forename	Surname	Account
Vidhya.SCDemo	Vidhya	Demo Xejic	WOB Account 34 - Simon Connell
Test Emails	Test	User	WOB Account 34 - Simon Connell
Stephen Farrelly IT	Stephen	Farrelly	WOB Account 34 - Simon Connell
Simon Support 2	Simon	Support 2	WOB Account 34 - Simon Connell
Simon.Demo	Simon	Connell - Admin Demo	WOB Account 34 - Simon Connell
Simon.Cranswick	Simon	Connell	WOB Account 34 - Simon Connell
Sam Nunn	Sam	Nunn	WOB Account 34 - Simon Connell
NIC Manager	NIC	Manager	WOB Account 34 - Simon Connell
NC_Demo_Admin	Neil	Curry	WOB Account 34 - Simon Connell
Multi.Account.Test.SD2	Hireful Test	2	WOB Account 34 - Simon Connell

You will then see the “Add Operator” button on the right hand side.



General

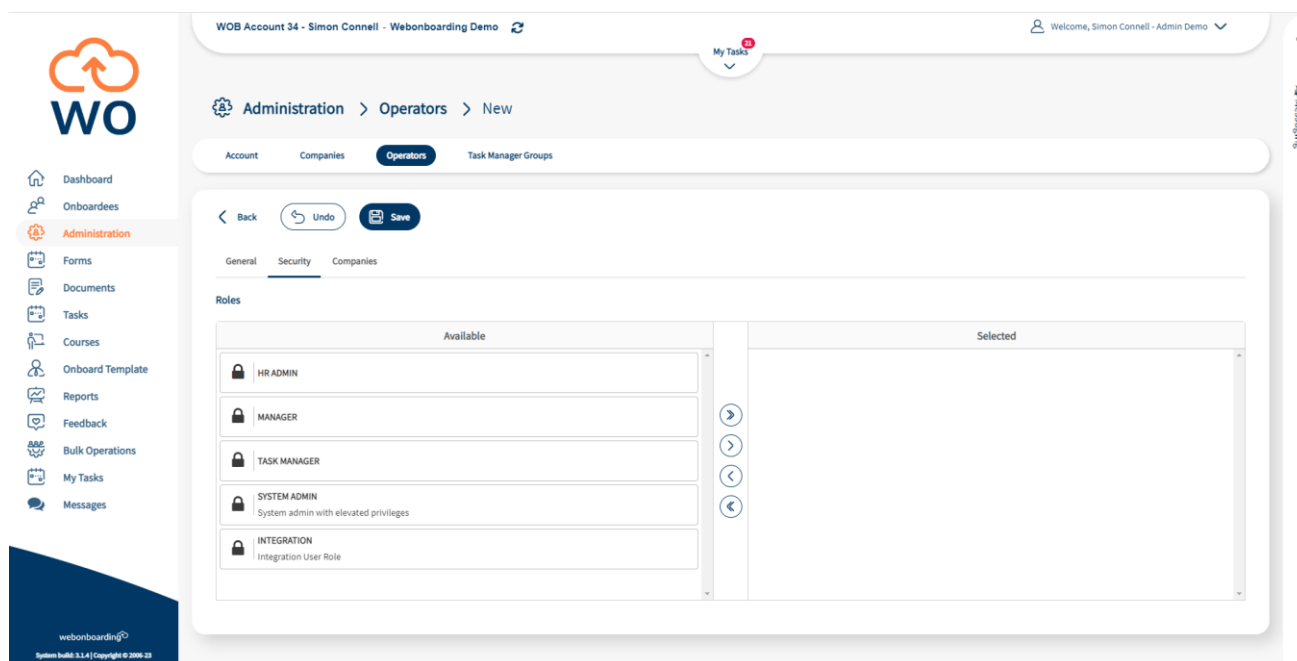
Here you will then be able to fill out the relevant information relating to the Operator you are adding.



The screenshot displays the 'New Operator' form within the 'Administration > Operators' section of the Webonboarding Demo. The interface includes a sidebar with navigation links (Dashboard, Onboardees, Administration, Forms, Documents, Tasks, Courses, Onboard Template, Reports, Feedback, Bulk Operations, My Tasks, Messages) and a top navigation bar with 'Account', 'Companies', 'Operators', and 'Task Manager Groups'. The form itself has tabs for 'General', 'Security', and 'Companies'. Under the 'General' tab, there are input fields for 'Forename', 'Surname', and 'Email', followed by 'Username' under the 'Credentials' section. A 'Force Password Change' checkbox is present, and at the bottom, there are radio buttons for 'Active', 'Inactive', and 'Active' status. The 'Active' status is currently selected.

Field	Description
Forename	First name of the user
Surname	Last name of the user
Email	Email address of user (must be genuine will be used for setting passwords and communication)
Username	String of characters, no spaces, can be an email address or any other useful name
Force Password Change	When selected on an existing Operator it will force a password reset after saving the record
Status	Set Operator to Active or Inactive

Security

In this section you can configure the security roles for an Operator. These roles determine how much information and which actions an Operator can take. Please see our document on the [Support Hub](#) for an explanation of each role.

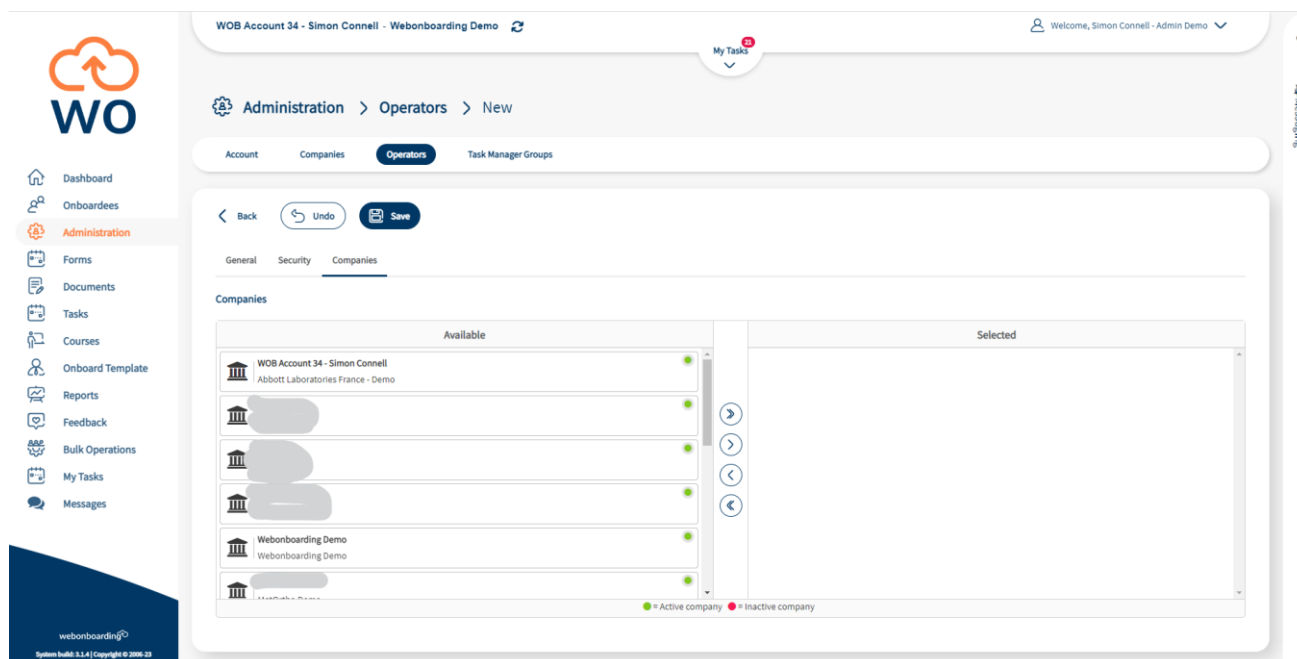



To assign a role either double click on the role on the left hand side, or use the  button to assign all roles or select a single role and use the  button.

NB – Do not use the Integration role for anything other than API access, these roles have no access to the user interface only the API.

Companies

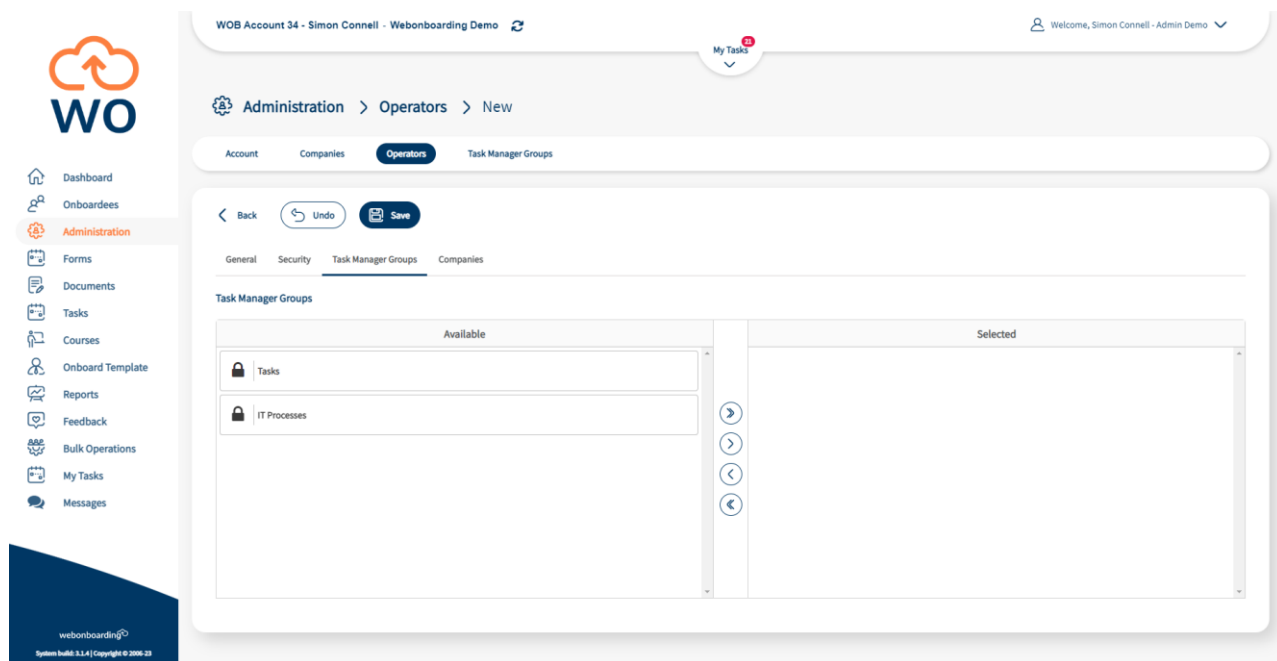
For each Operator you are able to select which Companies they can access in Webonboarding. This allows them to take all the actions and use the features for their allocated roles in the selected Companies. Combining Security Roles and Companies is a useful way of segregating data to the relevant Operators to maintain a secure system.





To assign a Company either double click on the Company on the left hand side, or use the  button to assign all roles or select a single Company and use the  button.

Task Manager Groups (only when Task Manager role selected)

When an Operator has a Task Manager role an additional section will be visible to select the relevant Task Manager Group(s) for that Operator. Task Manager Groups are where you can bring users together to manage specific tasks that relate to that group of users.



To assign a group either double click on the group on the left hand side, or use the  button to assign all roles or select a single group and use the  button.